Promoting sustainable wines towards Berlin retailers

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PREFACE

This research project was part of the study program of International Agribusiness at Aeres University of Applied Sciences.

The topics approached within this report includes sustainable wine marketing and distribution, as it was my main interests during my year of study and placement in Berlin.

I would like to thank Corry Uenk for the research coaching, Patrick Burgess for his help in Dronten and during the placement, as well as Pierre Lejeune for hosting me in his company in Berlin.

SUMMARY

Germany has a known a growth of organic consumption within the recent years, however its consumption is growing faster than the German wine production which is still relatively low. Therefore, a large amount of wine is imported from other countries, making Germany the largest organic wine importer in Europe. Within Germany, Berlin is the leading city for organic wines retailers, however the German capital has also seen a growth of a more specific kind of organic wines, the natural wines. Natural wines are made of organic grapes and vinified with the least possible inputs other than grapes. Even thought, the natural wine scene is growing in Berlin, it is still a niche product and has room to grow, especially when compared with global leading markets such as Paris or London.

Sustainable wine distributors, suppliers and other stakeholders have a major part to play in this possible growth as it could be an opportunity for them. However, the market being relatively small for now, most distributors have a small structure and lack of marketing strategy and budget. Thus, the research aimed at answering the following main research question: *How distributors can promote sustainable wines towards retailers in Berlin?* Therefore, the research was divided into four sub-question about the following subjects: The common characteristics of retailers, their purchasing behaviour, the sustainable wine offer on the market and the successful tool to distribute sustainable wines. To find these elements, a survey was sent to Berlin retailers, sustainable wine lists from retailers were analysed and successful sustainable wine distributors were interviewed.

It was found that Berlin retailers are mainly located in the neighbourhood of Neukölln, Prenzlauer Berg and Kreuzberg and opened since 2012. Besides, these retailers organize three types of events: tastings with winemakers, pop-up and wine pairing dinner. Retailers have chosen sustainable wine for its taste and most of them have more than 50% of sustainable wine on their wine list.

Considering their behaviour, retailers purchase wines from multiple wholesalers but a significant part of them also source directly with wineries. Taste, price and producers' knowledge are the most important purchasing factor for retailers whereas the most valuable aspects from a supplier are a close relationship and tailored recommendations as well as transparency and wine information.

Sustainable wine available on the market are mostly ranged between 20€ and 50€ with a great diversity of region of origin, the most represented being France, Spain, Italy, Germany and Austria.

The main difficulty with sustainable wine distribution is the lack of consumer awareness, especially in young market. Distributors could benefit from a growing awareness toward sustainable products as well as the support of the restaurant industry. The successful tools for sustainable wine distribution are the collaboration at all level of the supply chain, from the producers to the final market, a product marketing and sourcing relying on quality-driven products, products commitment and producers' knowledge.

Considering the results of this research, the recommendations for Berlin sustainable wine distributors are the followings. Sourcing must include diverse and quality-focused products which fit the market demand and price. Besides, to create a relationship with producers, it is needed to collaborate by including them on the marketplace, for instance with partner events or products. Lastly, distributors should target specific retailers with a sustainable approach in Neukölln, Prenzlauer Berg and Kreuzberg. To develop a relationship with the retailers, distributors must be customer-focused, offering tailored recommendations and working closely with them, for instance by organizing regular tastings.

1. INTRODUCTION

In May 2015, one of the world largest organic and natural wine fair promoter *Raw Wine* was organizing its first event in the city of Berlin featuring over 150 winegrowers coming from all over the world (Exhibitors - Raw Wine Fair Berlin, s.d.). After organizing fourteen fairs in the metropolis of London, New York and Los Angeles, the choice of a city more known for its high beer consumption (Smith, 2018) can be surprising, however the Berlin *Raw Wine* fair was a success and still happening every year in the trendy gastronomical venue *Markathalle Neun.*

However, the market for premium organic and natural wines is still a niche in Berlin, as it lacks consumers' awareness and does not have a long history with wine consumption. *Natural wine* is obviously part of the organic wine market; however, it goes beyond the simple use of organic grapes. It can be understood by the following definition: a wine produced with organic grapes and made with the less inputs possible. Yet, it needs to be understood as more than just a way of making wines, it is also a movement with ethic and values (Buranyi, 2018), which the researcher will explained more in details further in this report.

To understand what *natural wines* is, it is necessary to understand the evolution of the wine industry. During thousands of years, the winemaking process was focus upon the production of grapes whereas the transformation of the grapes juice into wine was still an uncertain process (Pretorius, 2010). The technological and scientific progress of the 20th century increased the production and was much more monitored, however, it leads to the growing use of chemical inputs and a standardization of the taste among the wines.

In response to this phenomenon, the first experimentations with what we now called "*natural wines"* happened in the 1970's, when the oenologist *Jules Chauvet* and the Beaujolais winemaker *Marcel Lapierre* produced their first non-sulphited vintage. At the time, the approach was at the opposite of industry trends where the use of new technology and chemicals was the norm to increase grapes yield and, consequently, produce more wines. (Lagorce, 2017)

Nowadays, the natural wine movement took another dimension: considering the organic rules not restricting enough regarding the winemaking process, many winemakers have chosen distinct themselves from the organic industry which they believed is as standardized as the conventional industry, however, most of the winemakers are still certified organic. For instance, producing wines with the "*Vin de France"* (cf. Table wine), or to be certified with the more restrictive label *Demeter*.

Vin de France is deeply associated with low-quality wines in France and is one the least restrictive geographical denomination as it is not a Protected Designation of Origin denomination, it allows a large winemaking freedom as they do not to worry about INAO control related to the taste conformity (d'Anval, 2017). For winemakers, it is also a way to express their dissatisfaction with the decisions of the "*Institut National de l'Origine et de la Qualité" (*cf. INAO, an institution which controls the PDO denomination) decisions and to differentiate themselves from conventional wines.

The *Demeter* certification need the organic certification and was founded after the work of German philosopher Rudolph Steiner in the 1920's, which focus on the lunar circle, natural prevention of diseases and fewer inputs authorized during the winemaking process (Saverot, 2017).

The natural wine movement can be identified as a counter-culture within the organic wine industry and promotes values and ideas such as the refusal of technological use in the winemaking process, craftmanship, small-scale production and a return to terroir-driven wines influenced by hazards of the nature (Haskell, 2016).

On a production point of view, the core differences concerning conventional, organic, biodynamic and natural wines are the followings: use of synthetic pesticides, number of oenological additives allowed and the total amount of residual sulphites per litre.

Synthetic pesticides are chemical compounds meant to kill pest that damage crops, they are a concern for both farmers and consumers as they are potentially toxic (World Health Organization, s.d.). Oenological additives such as yeasts, acidifying additives, glucose, or sulphur dioxide, are used during the winemaking to change the wine characteristics like the organoleptic components or the texture, thus, it can be controversial. For instance, exogenous yeasts are used to speed the fermentation, but it also changes the organoleptic characteristics of the wine like the yeasts. (Vin I. F.)

Sulphur dioxide or sulphite is the most used in the wine industry, it can be added at many stages of the process for its preservative effects. However, around one percent of the population is sulphite intolerant and it is commonly considered among consumers that it is a cause for giving headache but this affirmation has not been proven, one other controversial issues comes from the fact than using it in large amount inhibits the purity and the character of the wine, thus wine producers tends to reduce the amount of sulphites or remove it when the grapes harvest are particularly healthy. (Woolf, Sulfites in wine: friend or foe?, 2016)

In the European Union, only conventional wine allows the use of synthetic pesticides. When it comes to the organic production, the certification is focusing on the grapes production and synthetic pesticides are not allowed, but the winemaking process is lightly controlled and can allow many oenological and large number of sulphites. (l'Union, 2018)

A biodynamic production of grapes needs to be organically certified but has some more restrictive obligations and needs to use biodynamic preparations, 6 additives and a smaller number of residual sulphites (FRANCE, 2019)

Table 1: Wine denomination comparison

Criteria	Conventional	Organic	Biodynamic	Natural
Source of definition	E.U standards on wine production	Certification label (Ecocert)	Certification label (Demeter)	Charter from private organization (Association des Vins Naturels or Vins S.A.I.N.S)
Synthetic Pesticides	Authorized	Non-authorized	Non-authorized	Non-authorized
Additives	49 different additives authorized	35 additives authorized	6 additives authorized	1 additives authorized or none
Residual sulphites limit per litre	150 mg for red wines, 200 mg for white wines	100 mg for the red wines and 150 mg for the white wine	70 mg for the red wines and 90 mg for the white wines	30 mg for all wines

Defining natural wines is more complicated as no certification label is currently existing. “Natural wines” is only a commonly used name by both wine amateurs and people working in the wine industry for wines produced with the less possible inputs. However, it is deeply controversial for some winemakers as it implies that other wines are not naturals, other names that “natural” has consequently be used such as “wild”, “low-intervention”, “alive”, “naked”.

The absence of certification also come from internal reasons (Signer, 2016):

- Keeping an independent a free winemaking process
- The use of sulphites, some natural winemakers prefers to use a small dose when necessary
- The distrust of the INAO institution to set up a certification
- The fear that mass-production wine will use the label to promote their wines

A label certification has been studied by the INAO institution, but the project has been given up after major differences of opinion between members of CNAOC, the main DOP winemakers union, and representative members of the *Association des Vins Naturels* (A.V.N.) a private association gathering natural winemakers. The specifications of the A.D.V. was the basis for a potential certification as it is recognized among industry professionals (Reux, 2018) and retained the following criteria (Cahier des charges d’un vin AVN, 2017) :

- Organically or biodynamically grown grapes
- Hand-harvesting
- No pasteurization
- No chemical inputs authorized
- Limit of 30 mg residual sulphites per litre
- Only indigenous yeasts for fermentations
- No fining or filtration

The natural wine movement emerged by the rejection of mass production wines and is also a symbolic posture against the conventional industry. By nature, this movement is deeply linked with sustainability and the raising demand for alternative consumption and food transparency. Some natural winemakers openly said their work is deeply political as it is contributing to protect their land in the long-term and define themselves as engaged winemakers (Sauvard, 2018). The development of sustainable agriculture is also linked to the raising consumer awareness and what is also called the consum’actors. A *consum’actor* is a committed consumer who no longer passively accepted goods and services, he is sensible to what his buying decision involved and then, transform his consumption into a political act (Parodi, 2011).

The natural wines production is still a niche compared to the worldwide wine industry, however the subject has been spread all around the world in mainstream medias and large metropolis market such as Copenhagen, Paris, London, New York or Tokyo. The market for this product is already well established in these cities and its market share is growing every year.

Thanks to the growth of consumer awareness, the numerous natural wine fairs, and the recent increasing of sales, industry experts and distributors are predicting the growth of the global market that could follow the same growth as the global organic wine market which share is around 5 percent nowadays. (Woolf, How big is the market for natural wines?, 2016) However, estimating the natural wine market compared to the organic market is always ambiguous as most natural wines are certified organic or biodynamic.

In the European Union, consumers are increasingly interested in sustainable products, resulting in a constant growth of both production and demand with a total market of 29 billion Euro in 2015, a growth of 12% compared to 2014. Only four countries are representing 68% of this market and Germany consumption accounts for 30% of it (Bio, 2016).

However, when it comes to wines, the German consumption Is growing faster than its production (Douarin, 2017). The country is the first E.U. market for organic wines and the world leading importer of organic wine in the world as only 15% of the market is satisfied by German wines. There is not only a demand for organic products but also biodynamic products which are well appreciated and known by consumers as it was created in Germany back in the 1920's. Indeed, the Demeter brand, the largest for biodynamic products, was elected by Germans their 27th favourite brand in 2014 (Demeter, 2014).

Compared to other cities in Germany, Berlin is the leader of German natural wine market with seventeen natural wine retailers listed on the Raisin application, followed by Munich, Frankfurt and Cologne (Raisin, 2018). Raisin is a French application referencing all the winemakers and retailers worldwide, being one of the biggest databases for natural wine retailers. Wine shop, bar and restaurants can all be considered as retailers in this research project.

However, compared to leading markets such as Paris with more than two hundred retailers or even London, Copenhagen, Tokyo or New York, Germany is still considered as a conservative market and has room for growth. Considering its similarity with Denmark for price sensitivity, attitude towards sustainability and gastronomy trends, wine experts predict that it could follow the same growth and join the other wold main markets (Woolf, How big is the market for natural wines?, 2016), therefore, it should be an opportunity for stakeholders.

As it is not a wine producing region, Berlin distributors has a major part to play in this possible growth. Distributors can be defined as wholesale companies buying from producers or intermediaries in order to supply retailers, that is to say restaurants, bar or shops. However, the market being relatively small for now, most wholesalers have a small structure, usually only one person working as an agent for winemakers who has the exclusivity of the products on a specific region. The agent is taking care of all the import procedures, sales, and distribution; thus, the supply chain is short as suppliers imports directly from producing regions to their facilities.

Figure 1: Natural wine chain in Berlin

Business-to-business suppliers are divided by one medium-sized distributor, *Viniculture*, the oldest in the city and a few small-sized distributors who often have multiples activities and use different sales channels to sell their wines. For instance, some are diversifying with a permanent shop, an online shop, others have a bar or restaurant. The diversification of activities and the small size of these companies can lead to a lack of time and long-term vision as well as an insufficient budget for marketing, and, consequently, they do not have a clear sales and marketing strategy.

Besides, natural wine is a premium product which is not sold in supermarket and being a niche product which has no certification, it needs the intermediary of specialist retailers in order to explain the product to the final consumers, therefore main Business-to-Business (B2B) customers for suppliers are restaurants, wine shops and wine bars (Woolf, How big is the market for natural wines?, 2016).

The collaboration within this supply chain relies on a strong relationship between the buyer and supplier and thus, requires a high supplier contact and sharing of information (Burgess, 2018).

Due to a hard sales forecasting, these retailers require weekly delivery and smaller amounts than mass retails, a time-consuming situation for distributors.

Within major markets like Paris, London, or New York, it took years before the market was mature enough to accept that natural wine was more than a short-term trend and could be a major movement appealing new consumer to the wine culture (Coy, 2018). Promoting this innovative product to both B2B and B2C consumers attached to a traditional wine culture was a long process, but due to the support of the gastronomy industry and wine distributors, and the growing interest from consumers, the previously quoted cities can now rely on a dense and specialized network. Others key factors of development was the high exposure in mainstream press, the creation of natural wine focused media (magazine, books, comics, application, blogs…), and the numerous organic natural wine fairs, more than a hundred per year in France, that is to say two fairs a week (Salon des Vins Naturels 2018, s.d.).

Berlin wine market relies on a growing interest from organic and natural wines, a low national production and high importation from other countries, therefore, importers and suppliers have a key role to play. However, natural wine is a new product and there is a lack of case studies and market information available and small-scale suppliers lack a marketing strategy to sell their product, therefore this research aims to find marketing solutions for Berlin distributors in their activities. At last, this research should give distributors relevant information on the Berlin market, the sustainable wine retailers and broad recommendations to establish a marketing and distribution strategy within the supply chain as well as for the promotion of natural wines in Berlin. Wineries and retailers will also benefit of this research to get a broad vision of the market and better B2B integration within the supply chain.

Because of the lack of an official definition for *natural wine*, and weak boundaries between oerganic, biodynamic and natural, the researcher will use the term "*sustainable wines"* to embrace these three concepts.

This research will begin by an analysis of the sustainable wine retailers to point out their characteristics and define a retailer persona. Secondly, the purchasing behaviour of the retailers will be researched to identify their needs. Then, the researcher will analyse the current offer in Berlin to determine a price range and highlight the different trends in this market. Lastly, the research aims to find an appropriate marketing strategy to promote this product in Berlin by exploring existing case studies and interviewing industry experts. The results will be then discussed, and recommendations will be made according to the results of the research.

The aim of this research is to answer the following question: How distributors can promote sustainable wines towards retailers in Berlin?

The sub-questions are the followings:

I. *What characteristics does Berlin sustainable wine retailers have in common?*
II. *What is the purchasing behaviour of Berlin sustainable wine retailers?*
III. *What is the sustainable wine offer and on the Berlin market?*
IV. *What are the successful marketing tools to distribute sustainable wine*?

2. MATERIAL AND METHODS

To answer to the main question, both secondary and primary research has been used.

The secondary research employed is desk research, consisting of a study and analysis of existing literature according to each subject of sub-questions. Therefore, reports to study were focus on the German market and specifically the Berlin region as well as case study on sustainable wine, wine marketing and wine B2B customers.

The primary research was be based on both quantitative and qualitative methods. The quantitative method was used to analysis the sustainable wine retailers in Berlin by providing a questionnaire to build a retailer persona and define purchasing behaviour according to the results. It was also used to analysis the current offer in Berlin by studying the wine list of the retailers in order to understand main trends of the industry. As for the qualitative method, it was be used to find the appropriate marketing strategy for suppliers by interviewing industry experts.

Both secondary and primary research methods will be explained further in details in the paragraphs below for each sub-question.

I. Who are the sustainable wine retailers in Berlin?

This sub-question aimed to determine the profile of the retailers to understand which B2B customers are targeted as well as building a persona according to the characteristics founded during the research. The idea is to help suppliers in their marketing strategy by providing a clear idea of the retailers' characteristics.

The secondary research has consisted of a literature study: the research has focused on the whole market and explored data about retailers to have a broad overview of the market and repartition of the market shares between different categories of retailers similarities between retailers.

The second step to answer the first sub-question is to use the primary research.

A questionnaire with closed answers was created by the researcher and provided by e-mail to the sustainable wine retailers of Berlin. The list of retailers contacted, and the questionnaire structure can be found respectively in appendix 1 and 2. Answers to the question 2, 3, 4, 5, 6, 7, 8, 9 and 12 were used to answer this sub-question. Those questions focused on the following subjects: location, opening period, year of creation, activities, number of employees, suppliers and type of wine sold.

The researcher has provided the questionnaire to twenty-five sustainable retailers of Berlin, and eighteen of them has replied. The researcher has analysed the answers to highlight the main characteristics of retailers. Results will be analysed and transferred into graphs to see what the common characteristics of the buyers are.

After this sub-question, wine retailers' common characteristics has been discovered.

II. What is the purchasing behaviour of sustainable wine retailers in Berlin?

This sub-question aimed to analysis the purchasing behaviour of the retailers using both primary and secondary research.

The first step was to use desk research to gather information about the retailers' segmentation and the different channels used by wine retailers in the German market. Therefore, the researcher has analysed existing data using the following key words: German wine channels behaviour, organic wine supply chain, wine retailer's segmentation…

The second step was to use primary research with part of the answers of the questionnaire previously cited for the first sub-question. Answers to questions 10, 12, 13, 14 and 15 were used. These questions are related to the following subjects: reasons to choose natural wine, wine supply chain, important aspect of a supplier, most important purchasing factors, difficulty with natural wine.

Then, the researcher analysed the results and transferred them into graphs to highlight significant aspects of the purchasing behaviour of wine retailers in Berlin.

III. What is the current sustainable wine offer on the market?

This sub-question aimed to analysis the current sustainable wine offer in Berlin on multiple criteria: price, type of wine and region of origin.

The secondary research has focused on general information about the wine market in Germany. The researcher analysed data regarding consumption per wine category and wines imported per countries of origin. The following key words were used: wine consumption, wine trend in German, sustainable wine and imported wine in Germany…

The primary research has followed a quantitative approach and consisted of an analysis of wine lists of sustainable wine retailers. Each wine reference of the list has been studied in a tab with the following criteria: type of wine, country of origin and price. The researcher has then transferred results into graphs to highlight main trends according to the criteria.

This analysis was based on a six different wine list.

IV. What are the successful marketing tools to distribute sustainable wines?

This sub-question aimed to give Berlin sustainable wine suppliers and importers concrete tools to grow their business activities by using existing case studies and industry experts' recommendations.

The first step of the research consisted of a desk research of existing literature. The researcher has gathered information from previous researches about wine marketing strategy and B2B customers. The key words used to find documentation will be the followings: sustainable wine marketing, wine strategy, wine business, marketing tools, wine promotion…

Then, the researcher has contacted industry experts to gather tailored information about the promotion of sustainable wines towards B2B customers in Berlin. The idea was to have the insights and recommendations of sustainable wine distribution experts to obtain information about the marketing strategy to follow as well as to define the specificity of the Berlin market.

To answer this sub-question, the researcher has conducted six interviews between the 18th of April 2019 and the 10th of May 2019. Interviewees were chosen for their expertise in the field of sustainable wine distribution. The researcher also aims for industry experts who worked in non-producing region and supply metropolis market.

Interviews were semi-structured and done by phone or by e-mail. The six questions, adapted to the field of expertise of the interviewee, were focused on the following subject: B2B distribution difficulties, solutions, improving consumer awareness, ensuring long-term relationship with retailers, recommendations for sustainable wine distributors and future changes in the market. Complementary questions for Berlin experts were asked about the following subjects: reasons for the growing interest about natural wines in Berlin, strengths and weaknesses of the Berlin market. Structure of the interviews and transcription can be found in annexes 2 and 3 has focus on the following subjects: wine marketing, sustainable wine supplier's strategy, B2B customers, Berlin wine market.

To process the interviews, the researcher has followed an inductive coding to highlight the most mentioned themes and ideas within the transcription of the interviews. Codes were key words or phrase that convey to the same meaning. Firstly, the researcher has followed an initial coding to get broad ideas of the interviews. Then, line-by-line coding was used for the largest interview to highlight the most possible different codes, followed by the other interviews considering the length of their content. The next step was the categorization of the codes, to gather similar codes and start to highlight the most mentioned codes. To finish with, the researcher has determined and ranked themes thanks to the previous step and gather different perspectives on similar theme.

The first contact with the participants and interviews were done either by e-mail or phone. Interviews were semi-structured and consisted of open questions adapted to each participants' situation. The idea was to let the participant develop their own opinion to explore the widest range of subject possible. At least four sustainable wine distribution experts and two Berlin experts has replied to the interview. The structure of the interviews can be found in the appendix 2 and has focus on the following subjects: wine marketing, sustainable wine supplier's strategy, B2B customers, Berlin wine market.

3. RESULTS:

In this chapter, the results are presented per sub-question following the methodology previously explained in the chapter Materials and Methods.

First, results of the survey concerning sustainable retailers and their purchasing behaviour will be presented for the first and second sub-question, the objectives were to know who the sustainable wine retailers in Berlin are and understand their purchasing behaviour.

Secondly, the results of the data analysis gathered from five wine lists of retailers will be used for the third sub-question to get an insight of the current sustainable wine offer on the market. Lastly, interviews with six industry experts and literature review will be transposed for the last sub-question which aims to know what the solutions to the difficulties encountered by distributors are.

I. Who are the sustainable wine retailers in Berlin?

The objective of this sub-questions is to identify common characteristics of sustainable wine retailers in Berlin and define a persona of the population targeted by the suppliers.

Firstly, the researcher will present the result of the secondary research which aimed at gathering statistical data on wine sales per type of retailers within the whole German wine market. The report "The German Wine Market: A Comprehensive Strategic and Economic Analysis" has been explored for this matter. (Dressler, The German Wine Market: A Comprehensive Strategic and Economic Analysis, 2018)

Wine consumption in Germany represents two billion litters per year, divided in 15% of sparkling wine and 85% of still wines. Germany has a large density of outlets with a total of 35,000 over the country.

Most of the wine consumed in Germany (70%) is sold through retail, discounters and supermarkets. Total wine sales are divided in five categories:

- Discounters has the largest share with 35%
- Retail share is 27%
- Direct share is 16%
- Hospitality share is 15%
- Specialist wine store is 7%

The primary research was also used: a survey was sent to the sustainable wine retailers of Berlin between the 1st and 30th of April 2019. Respondents were first contacted by phone, then, the online survey was sent by e-mail. Within the total of the fourteen closed questions asked, questions 1 to 8 and question 11 were aimed to answer the first sub-question.

The researcher has focused on the following characteristics:

- ***Location***
- ***Opening period***
- ***Year of creation***
- ***Number of staffs***
- ***Activities***
- ***Events***
- ***Type of wines sold***
- ***Share of natural wines***
- ***Reasons to choose natural wines***
- ***Product difficulties***

In figure 1, answers to the question "*Where is your business located?*" are presented.

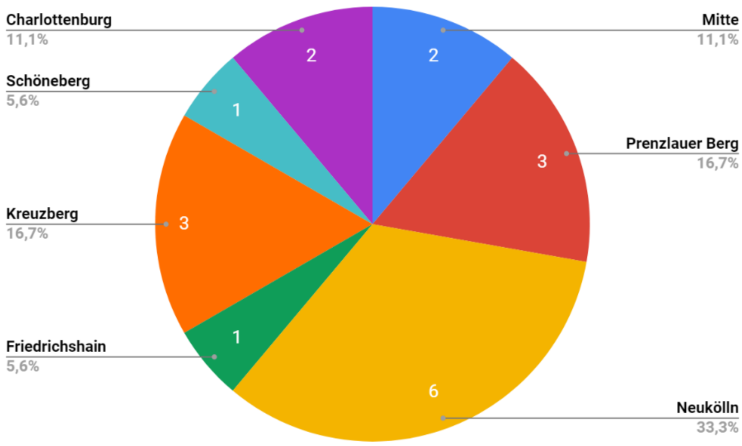


Figure 2: Retailers' business location

The main locations of the retailers are the neighbourhoods of Neukölln (33,3%), Kreuzberg (16,7%) and Prenzlauer Berg (16,7%). These three neighbourhoods represent the location of 66% of the sustainable wine retailers contacted.

The rest of the sustainable wine retailers are located in the following neighbourhoods: Mitte (11,1%), Charlottenburg (11,1%), Friedrichshain (5,6%) and Schöneberg (5,6%).

In figure 2, answers to the question "*When is your business open?*" are presented.

First of all, all the respondents are open during the evening, besides, 83,3% of them and all the Neukölln respondents are only opening during this period.

The same number of retailers says they are open during lunch time (16,7%) and afternoon (16,7%) and only one respondent (5,6%) is open during the morning.

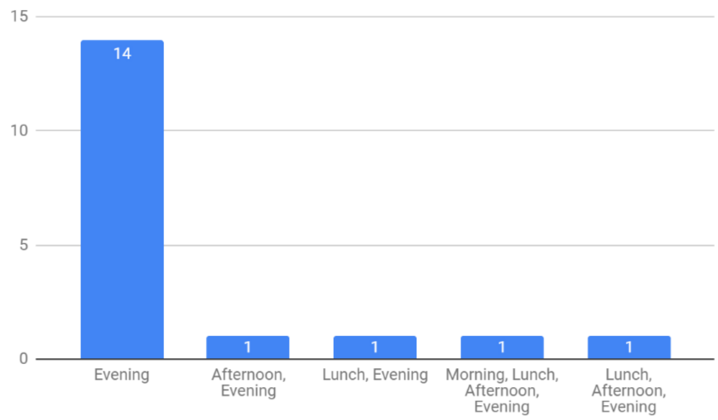


Figure 2: Retailers' opening period

In figure 3, the number of sustainable wine retailers created per year is presented.

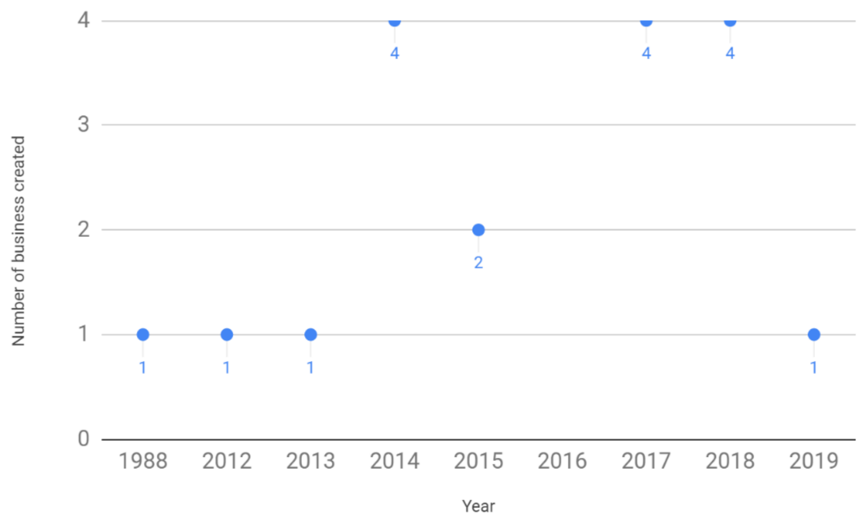


Figure 3: Year of creation of the retailers

The year of creation of the sustainable wine retailers contacted varies from 1988 to 2018. However, 94,4% of the respondent have opened since 2012 and 44,4% of them have opened since 2017.

From 2017 to 2019, retailers have mainly opened in the neighbourhood of Neuköln (50%) and Kreuzberg (25%).

In figure 4, answers to the question *"How many people work in your business?"* are presented.

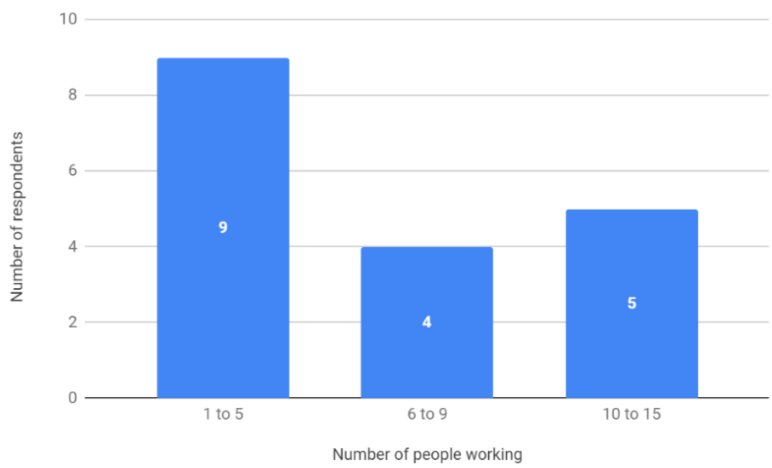


Figure 4: Number of people working in the sustainable wine retailers

Half of the retailers have between one to five people working in their business. For the other half of the respondents, 22,2% have between six and nine people working and 27,7% have between ten to fifteen people working.

In figure 5, answers to the question "*What are your activities*?" are presented. Respondents could choose multiple answers between the following items "*Restaurant*", "*Wine bar*", "*Wine shop*" and "*Tapas bar / Sharing dishes*", they also have the possibility to add their own answer.

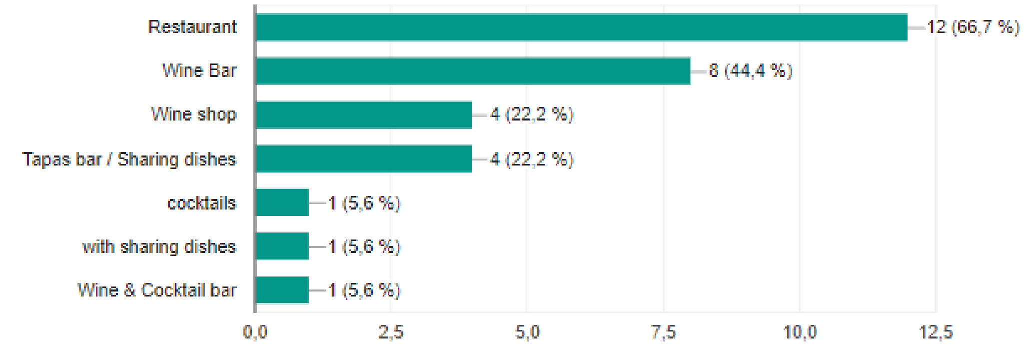


Figure 5: Retailers main activities

66,7% of the retailers have a restaurant activity, however, 38,8% of them have another activity. Half of the retailers have a bar activity, including the following items "*Wine bar*" (44,4% of the respondents), "*Tapas bar / Sharing dishes*" (22,2%) and "*Wine & cocktail bar*" (5,6%). Less than a quarter of the respondent have a wine shop and only one of the respondents has a wine shop as its only activity.

Apart from the previous quoted activities, a following question was asked about complementary activities. Five retailers replied they sell wines to takeaway, including three of the wine shops, two have an online wine shop and three retailers import wines and, two of them supply other businesses.

In figure 6, answers to the question "*What type of event do you organize?*" are presented. Respondents could choose multiple answers between the following items "*Pop-up dinner*", "*Wine pairing dinner*", "*Tasting with winemakers*", "*Wine seminars for companies*", "*Free public tasting", "Cultural events and concerts", "Private tastings with fee", "Wine fair"* and "*I do not organize events",* they also have the possibility to include their own answer.

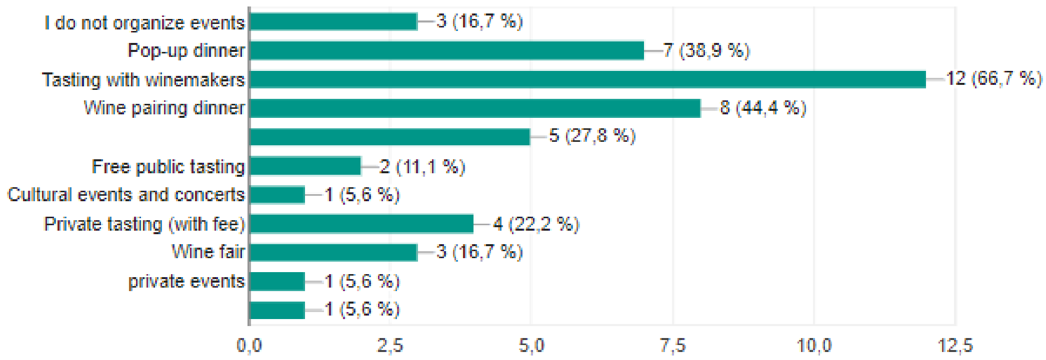


Figure 6: Type of events organized by the retailers

Only three retailers do not organize events and 72,2% of the retailers organize different type of events. Most type of events organized are tastings with winemakers (66,7%), wine pairing dinners (44,4%) and pop-up dinners (38,9%). A less significant part of the respondents organise wine seminars and tastings for companies (27,8%), private tastings with fee (22,2%) and wine fairs (16,7%).

In figure 7, answers to the question "What kind of wines do you sell?" are presented. Respondents could choose multiple answers between the following items: "*Conventional*", "*Organic*", "*Biodynamic*" and "*Natural*".

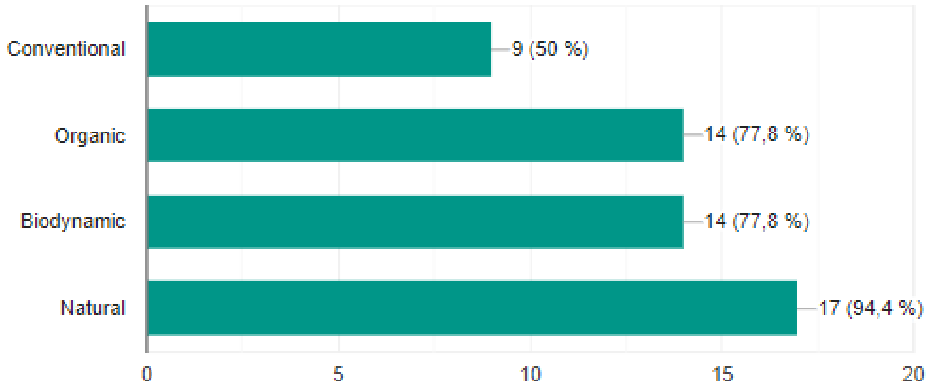


Figure 7: Types of wine sold by retailers

Firstly, half of the retailers answers all the categories. Secondly, most of the retailers sells organic wines (77,8%), biodynamic wines (77,8%) and natural wines (94,4%). Thirdly, half of the retailers sells conventional wines.

In figure 8, answers to the question "*What is the share of natural wines on your list?*" are presented.

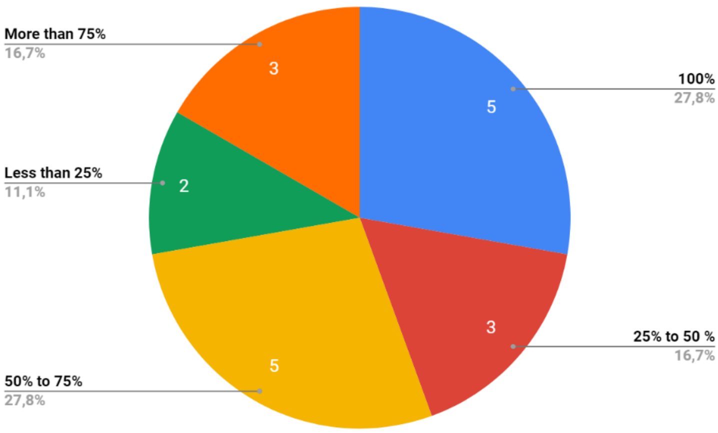


Figure 8: Share of natural wines on the list

More than a quarter of the retailers only have natural wines on their list. Besides, most of the retailers have more than 50% of natural wines of their list (72,3% of the respondents). Only two respondents have less than 25% natural wines on their list.

In figure 9, the answers to the question “*Why did you choose to sell natural wines?”* is presented. Respondents have to choose a unique answer between the following items: *“Taste”, “Less or no additives”, “Quality for price value”,* or “*Ethical issues”*, they could also add their own answers.

Figure 9: Reasons to choose natural wines

As we can see in figure 9, two third of the retailers have chosen to sell natural wines for taste issues. Only an insignificant number of respondents have chosen the other possible answers.

In figure 10, answers to the question “*What kind of difficulties do you face with natural wines*?” are presented. Respondents had a single choice between the following items: *“Related to suppliers, “Employees training”, “Preservation conditions”, “Lack of consumer awareness”, “High price”* or “*I do not face any difficulties”.*

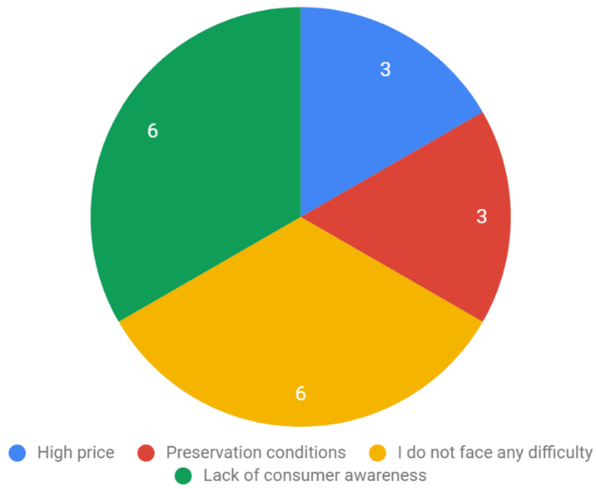


Figure 10: Difficulties related to natural wines

None of the retailers replied that they have difficulties related to suppliers or employees training. A third of the retailers do not face difficulties with natural wines and another third face difficulties regarding the lack of consumer awareness. Only three respondents say they face difficulties related to high prices and three others related to preservation conditions.

II. *What is the purchasing behaviour of sustainable wine retailers in Berlin?*

The objective of this sub-question is to understand the behaviour of sustainable wine retailers when purchasing wines.

Firstly, the results of secondary research will be presented which aimed at understanding wine supply chain channels and segmentation in the German market.

The researcher has explored reports such as the *"CBI Market channels and segments: Wine in Germany"* from the Center for the Promotion of Imports from developing countries. This report explores the wine trade in Germany especially the segmentation of retailers and the organization of the wine supply chain in Germany.

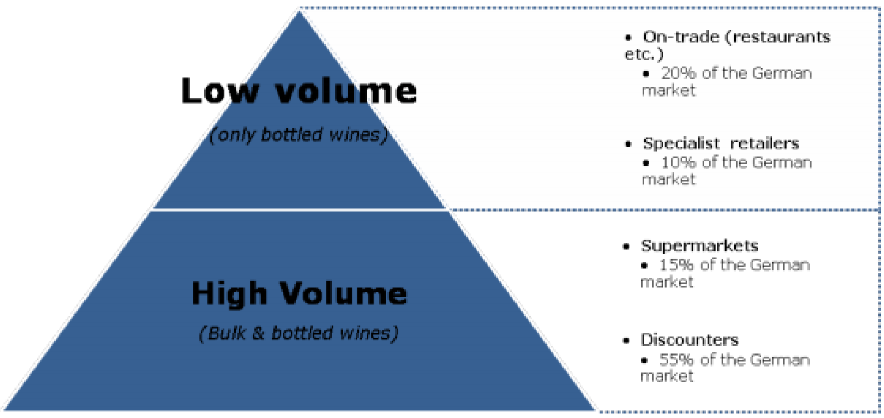


Figure 11 : Market segments for wine in Germany

In figure 11, it can be seen that the sector is dominated by discounters and supermarket accounting for 70% of the total of wine sales.

However, on-trade (Restaurants, bars and hotels) and specialist retailers belongs to the low volume and are supplying premium wines.

As explained in figure 12, most of on-trade and off-trade retailer go through at least one intermediary, which can be a Cash & Carry, an importer or an agent.

Besides, on-trade and specialist retailer focused more on specialist importer as they are looking for wines with a reputable image and good quality.

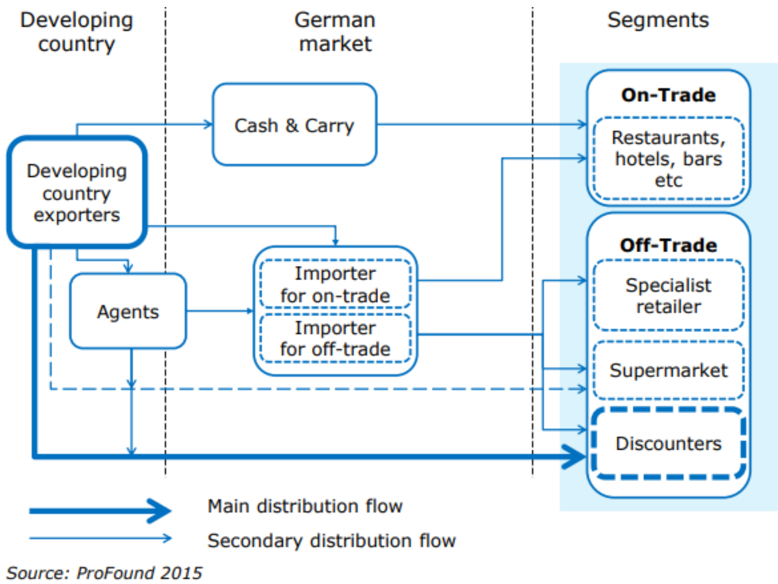


Figure 12: Trade channels for wine in Germany

For this sub-question, the same methodology as the one for the first sub-question was used, however question 10 and questions 12 to 15 from the survey. The researcher has focused on the following aspects purchasing aspects:

- ***Distribution channels***
- ***Purchasing factors ranking***
- ***Valuable aspect from suppliers***

In figure 13, answers to the question "*How do you purchase wine?*" are presented. Respondents could choose multiple answers.

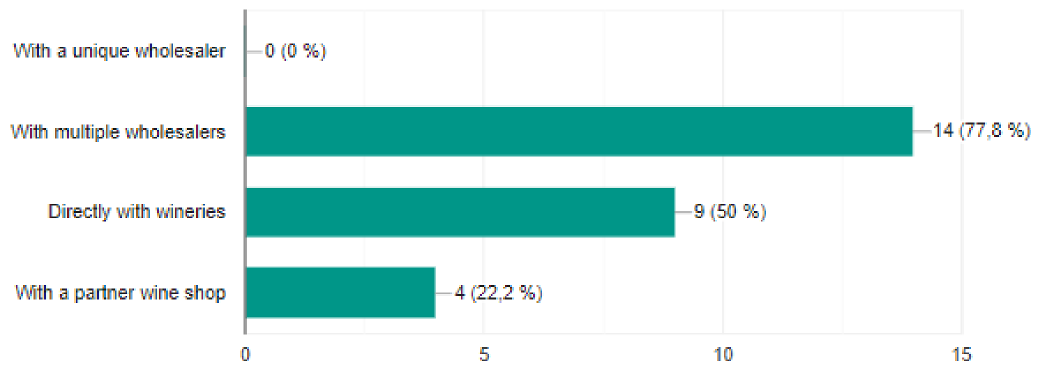


Figure 13: Retailers' distribution channels

Firstly, none of the retailers purchase wines from a single wholesaler. Secondly, most of them are purchasing from multiple wholesalers and a third of the respondents also have at least another distribution channel: directly with wineries, with a partner wine shop or with both distribution channels. Thirdly, half of the retailers are purchasing directly from wineries.

In figure 14, answers to the question "*Please, rank these factors when purchasing wine.*" are presented.

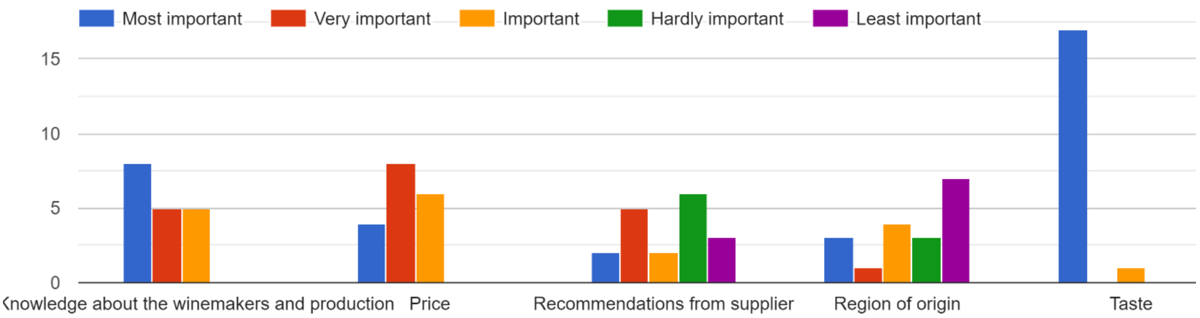


Figure 14: Retailers' ranking of purchasing factors

First of all, the “*Taste”* factor is the most important for 94,4% all retailers, the only other answer was “*Important*”. The second most important factor was the “*Knowledge about the winemakers and method of production”,* it was the answer of almost half of the retailers (44,4%), besides none of the retailers have judged it “*Hardly important*” or “*Least important*”, the rest of the respondents have judged it equally “*Very important*” and “*Important”*. The third factor is the “*Price”* as retailers judged it “*Very important” (*44,4%), “*Important”* (22,2%), or “*Most important*” (33,3%).

Factors “*Recommendations from supplier”* and “*Region of origin”* were the only one to receive all possible judgement, however, the “*Region of origin*” has the most “*Least important”* answers (38,9%) of all factors and 55,6% of the retailers judge it “*Hardly important*” or “*Least important*”. “*Recommendations from supplier”* is the only factor where there is not a clear tendency of the answers.

In figure 15, answers to the question “*What do you value the most from a supplier?*” in presented.

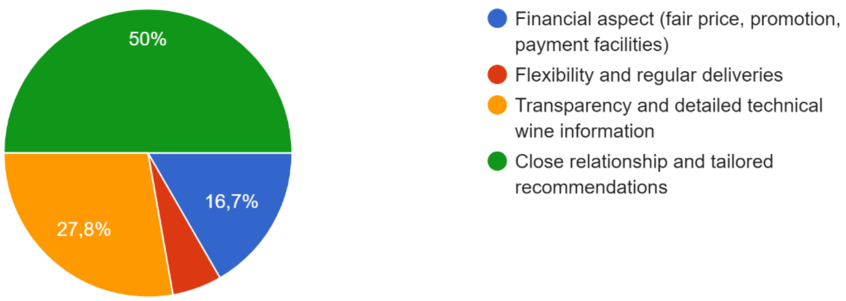


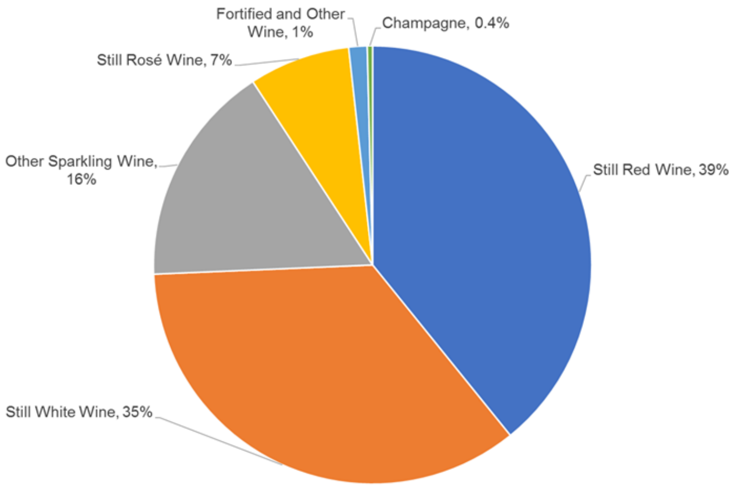
Figure 13: Most valuable feature from a supplier

Half of the retailers value the most a “*Close relationship and tailored recommendations*” when dealing with a supplier. The second most valuable aspect is the “Transparency and detailed technical wine information with more than a quarter of the respondent. The third most valuable is the “*Financial aspect”* and only one retailer value the most the “*Flexibility and regular deliveries”.*

III. What is the current sustainable wine offer on the market?

The objective of this sub-question is to have an apercu of the current products available on the market and highlight product tendencies in Berlin sustainable wine retailers.

Firstly, the researcher will present the result of secondary research which aimed at gathering statistical data on wine sales per wine category as well as wine imported per country of orginin in the German market.



Concerning the wine category, as seen in figure 16, the sales consumption in the German market is divided as the following:

39% red wines, 35% white wines, 16% sparkling wines, 7% rosé wines and 1% sweet wines. (Changing German wine market offers opportunities)

Figure 14: Wine sales in Germany per wine category

In figure 17, the wine imported on the German market per country of origin is presented. Regarding the country of origin of imported wines in the whole Germany, Italy, Spain and France are the most represented, following by United States, South Africa, and Austria.

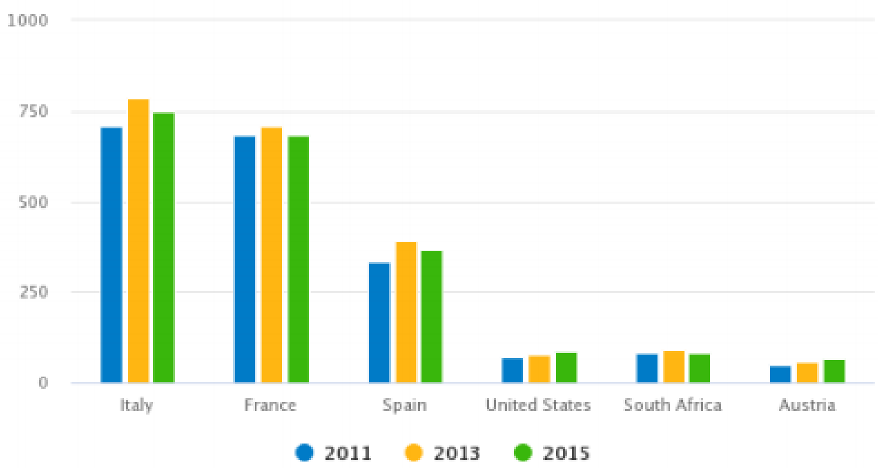


Figure 15 : Country of origin of wine imported on the German market

Secondly, the researcher will present the result of the primary research. To answer this sub-question, the researcher has gathered six wine lists from different on-trade sustainable wine retailers. Wines observed were coming from on-trade lists and prices are by the bottles, at the end, 376 wine references have been analysed for the research.

The researcher has analysed each wine reference under three criteria:

- ***Wine category***
- ***Region of origin***
- ***Price***

In figure 18, the number of wines per range of wine was analysed.

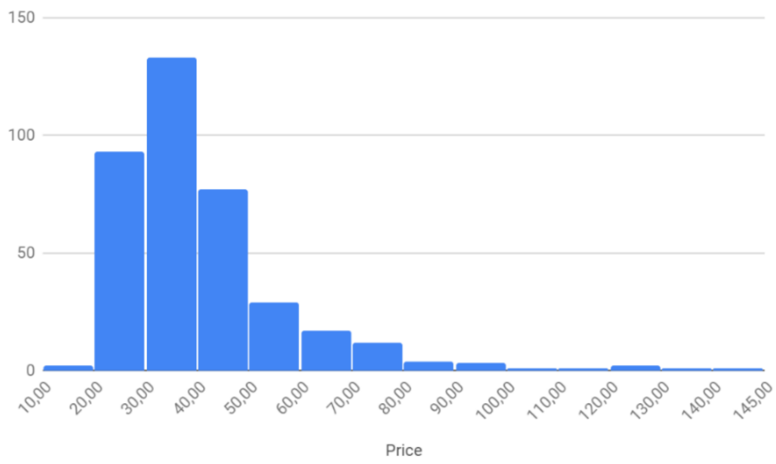


Figure 16: Price range

The wines observed were priced between 17€ to 140€ with an average price of 40,32€ and a median value of 35€.

Among those wines, the biggest wine range is 30€-40€, accounting for 35,1% of the wines observed, the second one is 20€-30€ accounting for 24,6**%,** and the third one is 40€-50€ accounting for 20,3%, these three wine range accounts for 80% of the wines observed. Lastly, the wine priced between 70€ and 140€ for only 6,6% of the total.

In figure 19, the repartition of the wines observed per wine category is presented.

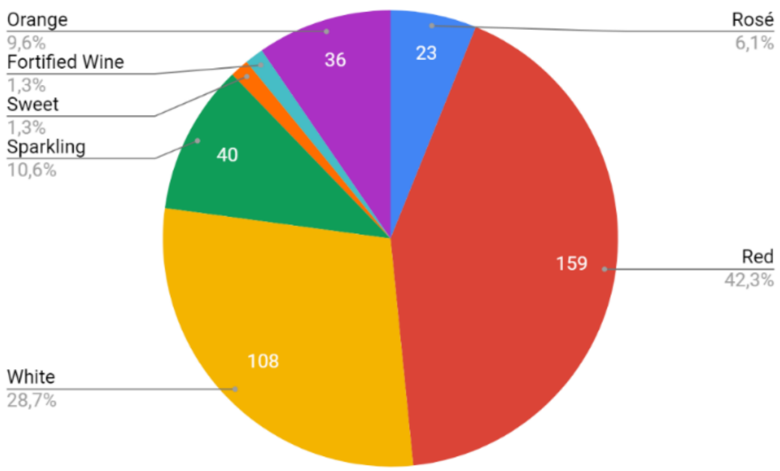


Figure 19: Number of wines per category

Red wines (42,5%) and white wines (28,7%) are the most represented among the wine observed accounting for 71% of the total.

They are followed by the sparkling wines (10,6%), orange wines (9,6%) and rosé wines (6,1%).

Sweet and Fortified wines only accounts for 2,6% of the total.

In figure 20, the repartition of the wines observed per region of origin is presented.

Fifteen different countries were represented among the wine observed.

The five most represented countries account for 92% of the wine observed:

1. France (43,6%)
2. Spain (21%)
3. Italy (12,5%)
4. Germany (9,3%)
5. Austria (5,6%)

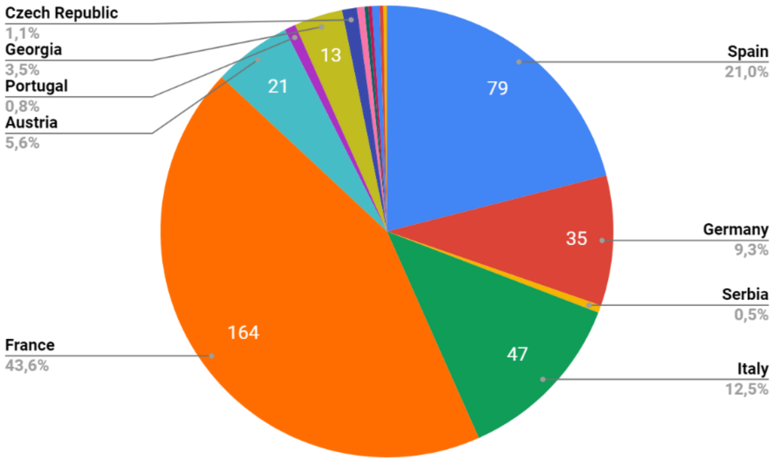


Figure 20: Number of wines per region of origin

Both Old World wine countries and New world wine countries were represented, however wines from the New World, including United States and South Africa, account for less than 1% of the total.

Among the thirteen Old World wine countries, five belongs to Central Europe, including Germany, Austria, Czech Republic, Slovenia and Hungary, four belongs to Eastern Europe, including Georgia, Bulgaria, Serbia and Slovakia and four belongs to Western Europe, including France, Spain, Italy and Portugal.

In table 1, the correlation between price and wine category is presented.

Red wines have the highest share among the wines observed as well as the highest dispersion of wines (20€ to 140€). The largest wine range is 30€-40€ but 65% are between 20€ and 40€ with an average price of 39,99. More than half of the wines are from France (54,7%) and Spain and Italy are the only other countries with more that 10% of the total. Germany has the highest average price (46,09€) and Spain the lowest (33,07€).

Representing 28,7% of the wines, white wines are priced between 20€ and 132€. They have the highest average price (42,37€) and is the only type of wine which the largest wine range is 40€-50€, representing 29,6%. The most represented countries ranking is very similar than the one for the red wines, but the repartition is more homogenous. French white wines have the highest average price (47,55€), all others countries' average prices are around 40€, apart from the one of Spain (33,29€).

Representing 10,6% of the wines, sparkling wines are priced between 21€ and 98€ but half of them are in the range 30-40€. French sparkling wines have the highest average price among all category an region of origin (50,24€), the second highest average price for sparkling wines is German wine (46€), Spain has the lowest average price (30,10€).

Orange wines represent 9,6% of the wines and has the highest minimum price (26€) and the second highest average price (41,28), its maximum price is 74€. The countries ranking is much more homogenous and change from the other type of wines as Italy is the most represented (30,6%), followed by Spain (27,8%), France (13,9%), Georgia (11,1%), Germany and Austria (both 8,3%).

Rosé wines only represent 6,1% of the wines and have the lowest minimum price and the smallest dispersion as the maximum price is 49€, it also has the lowest average price with 32,09€.

Table 1: Correlation between price and wine category

WINE CATEGORY	*Share of all wines*	*Minimum price*	*Maximum price*	*Largest wine range*	*Average price*	*The five most represented countries*	*Average price per country*
RED	42,3%	20€	140€	30€-40€ (37%)	39,99€	France (54,7%)	39,22€
						Spain (18,2%)	33,07€
						Italy (10,7%)	42,06€
						Germany (6,9%)	46,09€
						Austria (4,4%)	33,29€
WHITE	28,7%	20€	132€	40€-50€ (29,6%)	42,30%	France (38,9%)	47,55€
						Spain (19,4%)	33,29€
						Germany (13,9%)	40,60€
						Italy (9,3%)	40,80€
						Austria (6,5%)	40,43€
SPARKLING	10,6%	21€	98€	30€-40€ (50%)	40,93€	France (42,5%)	50,24€
						Spain (25%)	30,10€
						Italy (17,5%)	29,86€
						Germany (7,5%)	46,00€
						Czech Republic (5%)	37,50€
ORANGE	9,6%	26€	74€	30€-40€ (38,9%)	41,28€	Italy (30,6%)	46,55€
						Spain (27,8%)	32,80€
						France (13,9%)	41,00€
						Georgia (11,1%)	49,25€
						Germany (8,3€)	48,33€
						Austria (8,3%)	33,00€
ROSE	6,1%	17€	49€	30€-40€ (37,5%)	32,09€	Spain (30,4%)	29,14€
						France (26,1%)	32,17€
						Germany (13%)	37,67€
						Austria (13%)	28,33€
						Italy (8,7%)	36,00€
TOTAL (including sweet and fortified)	/	**17€**	**140€**	**30€-40€**	**40,32€**	**France (43,6%)**	**42,36€**
						Spain (21%)	**32,27€**
						Italy (12,5%)	**40,72€**
						Germany (9,3%)	**42,97€**
						Austria (5,6%)	**35,14€**

IV. What are the successful marketing tools to distribute sustainable wines?

The objective of this sub-question is to find solutions for suppliers in their distribution strategy.

First, the results for secondary research will be presented. The researcher has explored the report "*Creating the market for organic wine: Sulfites, certification and green values"* which deals with the challenges of the organic market and successful marketing example to promote organic wine on the market.

In this report, authors point out the main challenge as being scepticism from the wine consumers and retailers. For instance, Tony Coturri, pioneer organic winemaker from the Sonoma county in California faced mistrust when meeting potential retailers in San Francisco.

Besides, organic wines suffered from a bad reputation from consumers and critics as its lack of preservatives led to consumers thought it will not be well preserved. Organic wines are also associated to healthy products and therefore less enjoyable than conventional wines.

Moreover, organic wines are considered more expensive than conventional wines and consumers believed that organic methods resulted in a lower quality due to a trade-off between quality and environmental goals.

Secondly, the report presents different marketing strategies followed by vintners and distributors to promote their product.

Most of them has chosen not to focus on the organic aspect of the wine, some Californian wineries has even chosen to not advertise their wine as such by not mentioning their certification on the wine label.

They emphasise on the organoleptic qualities of their products and by explaining specifically their winemaking methods to increase consumer awareness. Thus, importers have chosen to learn more about the wine industry by taking trips to the vineyards, developing wine expertise and relationship with the suppliers.

The results of the primary research will now be presented, three main aspects have been explored:

- ***Difficulties encountered with B2B retailers***
- ***Possible opportunities for sustainable wine suppliers***
- ***Actions and strategy to increase customers' awareness and ensure long-term relationship***

To answer this sub-question, the researcher has conducted six interviews with experts in the field of sustainable wine distribution, two of them were living Berlin, the others were working in London, New York, and the Netherlands. The researcher also aims for industry experts who worked in non-producing region and supply metropolis market.

In table 2, the list of interviewees is presented, a broader presentation in the Annexe before each interview.

Table 2: List of interviewees

INTERVIEWEE	POSITION	COMPANY DESCRIPTION	LOCATION	DATE OF CREATION
DOUG WREGG	Marketing Director and Wine Buyer at Les Caves de Pyrene.	Largest organic and natural wine supplier in the UK, fair organizer and Horeca group.	London	1998
CHRISTIAN TROY	Managing partner of Indie Wineries.	Organic and natural wine supplier in the U.S., importing 18 states and distributing in 5 states.	New York	2011
PHILLIPE ESSOME	Founder and Wine Buyer of Ten Bells and Fifi's Wine.	Ten Bells is a New-York-based natural wine bar. Fifi's Wine is an organic and natural supplier in New York.	New York	2008 2016
LIV FLEISCHHACKER	Food and Beverage journalist, writer and co-founder of Berlin Drinks.	Berlin Drinks is an online website founded which list Berlin bars.	Berlin	2017
HOLGER SCHWARZ	Owner and Wine Buyer at Viniculture.	Viniculture is an organic and natural wine shop. Since 2006, it supplies B2B and is the Berlin leader.	Berlin	1984 2006
RICHARD VAN LINDEN	Sales Director at Coenecoop.	Coenecoop are one of the Dutch leaders for the imports and B2B supplies of organic wines. They also exports in Belgium, Sweden and Germany.	Netherlands	1991

Interviews were semi-structured and done by phone or by e-mail. Questions were focused on the following subject: B2B distribution difficulties, solutions, improving consumer awareness, ensuring long-term relationship with retailers, recommendations for sustainable wine distributors and future changes in the market.

To process the interviews, the researcher has followed an inductive coding to highlight the most mentioned themes and ideas within the transcription of the interviews. An initial coding was done, then, line-by-line coding was used. To finish with, the researcher has categorized the codes, determined and ranked the themes.

The following results show the most mentioned themes, organized in three axes: difficulties encountered, external factor of growth and marketing strategy and actions set up by interviewees.

In analysing the interview data, many themes have emerged which will be present in this section. To begin with, the researcher will present themes related to the difficulties as it was the first subject approached. Then, the external factor of growth and recommendations from industry experts will be presented.

In table 3, difficulties encountered by sustainable wine distributors are presented.

Table 3: Difficulties encountered by sustainable wine distributors

Category	Theme	Consequences	Keywords	Number of Quotations
DIFFICULTIES	***LACK OF PRODUCT AWARENESS***	▪ No knowledge ▪ Unknown quality	"knowledge" "not known" "never heard"	3
	PIONNEER DISTRIBUTION	▪ Uncertain opportunities ▪ Small market	"first" "only one"	3
	WINE SENSITIVITY	▪ Bottle variation ▪ Higher preservation conditions and transport	"bottle variation" "faults "oxidised"	3

When asking about difficulties encountered at the beginning of their activities with B2B customers, most interviewees mentioned the lack of product awareness within the marketplace. Key words researched were "market knowledge", "not known", "never heard" or any sentences referring obviously to the theme.

For instance, Doug Wregg mentioned *"At first, natural wines in the UK, they* (cf. the B2B customers*) never heard about it, the thing was not even happening in Paris"* and Holger Schwarz says, *"These wines were nearly not known"*, these two distributors mentioned the absence of knowledge from the market about what is natural wines. Another distributor, Richard Van Liden adds another point: *"People were doubting the quality"* which links to the following aspect.

This lack of product awareness is also related to another factor mentioned by half of the interviewees, their presence as pioneer distributors. Key words researched were "first" or "only one". Doug Wregg adds another point to this factor *"At that stage, no one was knowing if it was going to be trend or if it was going to last"* which highlights the early stage of the market and the uncertain opportunities.

A last theme related to the difficulties was mentioned by half of the interviewees concerning the product itself: the more sensitive aspect of sustainable wines that could leads to bottle variation. Christian Troy, from New York, mentioned that this risk is emphasized in global market and Mr. Schwarz is relating to customers difficulties, mentioning *"They nearly brought back every single bottle, thinking it was oxidized or sick".* To finish with, Liv Fleischhacker focused on the solution to this problem *"Educating the consumer in terms of faults and flaws is something that I think we need to see more of*" and defend the improvement of consumer's knowledge on this subject by the wine industry stakeholders.

In table 4, the external factors of growth are presented.

Table 4: The external factors of growth mentioned

Category	Theme	Benefits	Keywords	Number of Quotations
EXTERNAL FACTORS OF GROWTH	***GROWING WINE AWARENESS***	▪ Increased product knowledge ▪ Committed retailers and consumers	*"knowledge"* *"educated"* *"aware"* *"involved"*	6
	GROWING MARKET FOR SUSTAINABLE PRODUCTS	▪ Increased B2B demand ▪ Large choice of qualitative products ▪ Growing opportunities	"organic" "environmental" "aware" "sustainable"	5
	SUPPORT OF THE HORECA INDUSTRY	▪ Renown quality ▪ Product mediatization ▪ Interest from retailers and consumers	*"restaurant" "gastronomy" food" "bar"*	3

To explain their company's success in their respecting market or the general interest for sustainable wines, interviewees all mentioned external factors of growth. The most mentioned is the growing customer's awareness, both B2B and B2C, but also the growing demand and offer for sustainable products and the support from gastronomy and retailers.

To research the growing customer's wine awareness, key words such as "knowledge", "involved", "aware", or "educated" were sought out. Interviewees had very similar words about the subject: When Richard Van Liden said "*People are becoming more and more aware"*, Christan Troy mentioned that "*Buyers are more knowledgeable than they have ever been",* Berlin distributor Holger Schwarz goes even further supporting the fact that "*Nowadays, almost everyone has tasted them"* while journalist Liv Fleischhacker predicts the growth of "*educated customers"* for the Berlin market.

The following aspect is the growing market for sustainable products considering two aspects: the growth of qualitative sustainable products and the growing demand for sustainable products. Key words researched were "organic", "environmental", "aware", "sustainable" and other sentences that relate to the subject. Half of the interviewees were emphasizing the fact that, as suppliers, they now have the possibility to choose from many different qualitative sustainable wines. Besides, Doug Wregg focused on the growing environmental awareness from both growers and consumers. To conclude, Richard Van Liden mentioned that one of the things that convinced the retailers is the fact that "*People were asking for it"* and predicts a continuous growth: "*This is a movement that can be stop, people are becoming more and more aware and wine is part of it".*

On one hand, interviewees had mentioned the growing interest from different stakeholders on both sides: production and marketplace included. On the other hand, Doug Wregg mentioned the relationship with a third party, the press which, according to him, was not good at the beginning and changed after the opening of a B2C venue: "*As result of opening the wine bar and getting a lot of good reviews and good critics, a lot of people from the restaurant trade were very interested"*, the support of the gastronomy support will be develop in the followings.

Half of interviewees mentioned that the support of the gastronomy sector helps to grow the organic and natural wine market. Keywords looked up were: *"gastronomy", "restaurants",* and "*food*". Doug Wregg has a broad explanation of the phenomenon in London:

"*Over the years, what had changed was more and more wine companies started to specialise in these wine, dozens and dozens of restaurants started listing the wines and it became a fact until you cannot really argue about it, because the wines are everywhere! There were not so many specialists, maybe twenty to thirty retailers, it was not much of a natural wine scene, but you now find these wines in most restaurants. Even in Michelin-starred restaurants, a lot of wine are natural. The argumentation sort of stops, because people could not deny that the wines are any good.* "

Furthermore, in the Berlin market, Holger Schwarz had a similar argument about it: "*With time, people were more used to it, because they drunk it once in London, Paris or Scandinavia and then, also with this Noma aspect, this gastronomical vibe as well, you were more able to succeed."*

He quoted the *Noma*, which is a 2 Michelin-starred Copenhagen restaurant known for sourcing only organic and natural wines. The *Noma* was world-famous for being awarded four times best restaurant in the world from 2010 to 2014 by the "Worlds 50 Best Restaurant" list. To finish with, Liv Fleischhacker point out that "*The last decade has seen a huge influx in the food and drink world in general here in Berlin"* to justify the growth of sustainable wine in Berlin, she also adds that suppliers should target at "*more classic, non-hip, non-new food scene restaurants*".

In table 5, the different types of collaborations recommended by distributors are presented.

Table 5: Type of collaborations mentioned

Themes	*Sub-themes*	*Example*	*Benefits*	*Keywords*	*Number of Quotations*
COLLABORATION	***WITHIN THE MARKETPLACE***	▪ Common wine fair ▪ Partner B2C venue ▪ B2C tastings	▪ Communication ▪ Consumers awareness ▪ Sense of community	*"relationship"* *"meet people"* *"working together"*	4
	WITH PRODUCERS	▪ Partner products ▪ Pop-up events ▪ Vineyard visit with retailers	▪ Tailored product for the market ▪ Product differenciation ▪ Exclusivity		3
	WITH RETAILERS	▪ Allocation system ▪ Tailored recommendation ▪ Meeting with producers	▪ Long-term relationship ▪ Product commitment		4

When asking about recommendations for suppliers and how to overcome the quoted difficulties, the first theme to came out was the collaboration with other stakeholders.

Firstly, most of the interviewees mentioned the importance of collaborating in the marketplace. Keywords looked were "*meet people*", *"working together*", and *"relationships"* and any other sentence related to the subject.

For instance, in the Berlin market, Liv Fleischhacker suggested that "*people should be working together more"* while Phillipe Essome recommended to "*Go out and meet people*" highlighting the importance of the network. Furthermore, Doug Wregg recommended two things on this subject: *"Find a wine bar, not only a place that sells good wines, but it needs to have good food, good atmosphere, where people want to meet and have a good experience that makes wine fun."*

He first suggested the importance to have a partner venue that showcase the products, he adds that it is not only about the product itself, but the atmosphere of a venue matters as well and it. Then, he mentioned the importance of the fairs:

"*Wine fair rules everywhere, it is always a good idea but, in the end, it is just another wine fair in another place, so you have to be inventive and also in the first year you need to make it really small and intimate, Not every country has an articulate wine spokesperson for wine, it does not matter sometimes it is just the friendliness of the people in the city, for example Vienna is a great city for wine: everyone knows everybody, you can see there is a natural wine scene going on, and I think that also attracts people who came there also for the wine, it has that feeling there."*

He suggested that this type of events needs to be appealing to both consumers and stakeholders and can also increase the sense of community around wine in a city. For instance, he mentioned that the wine fair he organized in London with other wine merchants was "*the year that really changed the game"* and that *"putting the growers in front of the consumers and the trade, it was the simplest thing to do".*

The second type of collaboration mentioned by half of the interviewees was the collaboration with producers. They are all specifically suggested that working closely with the wineries could help them to fit the market. Holger Schwarz explained a partnership they built with German wineries:

"You always must be a bit further, to us it is important to take the very small wineries and to have our own labels, which we are doing right now, especially with these small biodynamic German wineries. We do the wines together, with our experience, to have our own product, to differentiate our own personal brand so there is a clear footprint from Viniculture and it is also good for the wineries as well because they can work with our experience in the market and maybe as well, a bit how to make the wine. I think this a good way to get the higher prices (…) We are not really a producer, but we are doing the labelling (…) and every demand is coming back to us for Germany"

Holger Schwarz refers to three benefits: having a product that fits for the market, getting the higher prices and the exclusivity of the distribution. Besides, Doug Wregg had similar views: "*As we grow as a company, we have more power to buy wines we like, so we may say 'We can buy thousands of bottles of a wine you would made in this style'"*, he suggested the same kind of collaboration but at a lower level.

Another type of collaboration mentioned by four interviewees is the one with B2B customers and the need to be customer-focused. First of all, Liv Fleischhacker and Doug Wregg suggested face to face meeting between producers, retailers and consumers, using similar words: "*More face to face meetings at entry points that are feasible for the general public. Once you meet the winemaker you put a face to the label, you're more likely to continue buying their wine"* (Liv Fleischhacker) and *"Get the growers in town, do pop-ups in restaurants, get them to take over the place. Your biggest selling tool is when people actually meet the growers, because they feel attached to the wine. (…) if you have enough wine bars and enough stuff happenings, people will end up there eventually so get them a reason to come over and work in the market."* (Doug Wregg)

They both highlight the fact that meeting with the winemakers is a great selling tool because you create a link between the producer and his product with the customers.

Besides, Christian Troy and Holger Schwarz add that they both took actions to be more customer-focused such as building an allocation system for retailers or having a portfolio of more conventional wines.

In table 6, the different aspects of product marketing are presented.

Table 6: Mentioned recommendations for product marketing

Themes	Sub-themes	Benefits	Keywords	Number of Quotations
PRODUCT MARKETING	***NOT FOCUS ON ORGANIC AND NATURAL ASPECT***	▪ Fits the demand ▪ No conflict with the conventional market ▪ Open to traditional retailers	*"definition"* *"label"* *"dogmatic"*	5
	TASTING IS THE MOST IMPORTANT	▪ Selling tool ▪ Product knowledge ▪ Growing awareness	*"Taste"*	5
	STORY TELLING	▪ Product commitment ▪ Engage people with ▪ Product knowledge	*"Story"* *"Explained"*	4

Then, interviewees approached other kind of recommendations, related to distribution and product marketing.

Firstly, all the interviewees mentioned that if a wine is organic or natural, it cannot be the main marketing argument within the wine market. Doug Wregg mentioned that "*People were more interested in just a label, like organic", "Consumers education is not about organic"* and *"We never wanted to impose a definition or a manifesto"* it suggested that consumer's awareness cannot go only through the certification of a producer and it is important not to be closed with a definition. Christian Troy mentioned a similar aspect to their wine sourcing "*We like to see our producers who work with native yeasts and low sulphur level, but we are not dogmatic about it"* whereas Phillipe Essome assumes that he "*hate the word 'natural wine' ".*

However, when it comes to wine marketing, interviewees were unanimous about one thing: tasting is most important. According to Phillipe Essome, "*the wines are supposed to speak for themselves*", thus he recommends to "*Going out with wines and make customer taste them"*. Doug Wregg has similar views "*Every step (*cf. of education*) is done by taste, it happens to me the same way, I tasted the wine and it blew my mind!"*. Liv Fleischhacker has recommendations concerning the Berlin market: *"Restaurants should be open to hosting more tastings (…) Specifically in a city that has no close wine region."* as previously quoted, she suggested to opening things to the public with face to face meetings.

The last recommendations for product marketing was the story telling, which was mentioned by five interviewees. Doug Wregg, Christian Troy and Phillipe Essome had similar words about this subject and recommend to *"tell the story behind the wines"* mentioning the producers but also "*what the soil look like"* or *"the hard work done in the vineyard"*. Doug Wregg assume that "*All those sorts of interesting things engage people with the wines".*

The last theme of recommendations was focused on the product sourcing.

In table 7, the recommendations for product sourcing are presented.

Table 7: Mentioned recommendations for product sourcing

Themes	*Sub-themes*	*Benefits*	*Keywords*	*Number of Quotations*
PRODUCT SOURCING	***PRODUCERS KNOWLEDGE***	▪ Understanding of the products ▪ Relationship with growers ▪ Better storytelling	*"growers"* *"producers"* *"winemakers"*	4
	QUALITY-DRIVEN PRODUCTS	▪ Brand identification ▪ Selling tool ▪ Growing sustainable wine awareness	*"quality"* *"good* *"better"*	6

First, four interviewees point out that it is essential to have a deep knowledge of the producers which is linked to the recommendation of "storytelling". Christian Troy says that a supplier needs to "*Understand the producer and the producer's wines you are working with"* and insists on the fact that *"Relationships on both sides, with wineries and market, are more key now than they ever have been".*

Doug Wredd adds that *"The only thing to understand is that we talk to our growers a lot, we follow what they do"* highlighting the relationship and the understanding of the work done in the vineyard. When asking about how they ensure long-term relationships with the retailers, Richard Van Liden point out that "*We have a lot of knowledge of what is happening in the market".*

The second ideas that came out when talking about the sourcing was the need of quality-driven products, all interviewees mentioned that subject. Keywords researched were "quality", "good" and "better".

To begin with, Holger Schwarz and Christian Troy had similar words to explain how they succeed "*We believe in quality first", "We just believed in the quality".* Doug Wregg also suggested that "*It is not about the price, it is about the quality (…) you need to have good wines to see your wines succeed"* and Phillipe Essome mentioned that "*If you build your brand about quality wine, your customers will follow you".* To finish with, two interviewees are predicting that "*People are drinking less wine but better quality in general" and "Consumers demanding better products."*

4. DISCUSSION

In this chapter, the researcher will discuss the results of the research. The most important findings will be present for each sub-question, afterwards, two different aspects will be discussed: the chosen methodology and the results.

The objectives of this research were about finding solutions for importers and suppliers to promote sustainable wines towards Berlin retailers. To achieve this purpose, the researcher has studied who are the Berlin retailers and their purchasing behaviour, to identify the target population. Then, the research concerned the current offer of sustainable wine within the market as well as finding appropriate marketing tools to target sustainable wines retailers.

I. Who are the sustainable wine retailers in Berlin?

The objective of the primary research was to define a retailer persona for sustainable wine retailers in Berlin. The results have been gathered thank to a survey addressed to the retailers between the 1st of April and the 30th of April 2018, eighteen retailers have replied the survey. The researcher was looking for the following data: Location, date of creation, number of employees, opening period, activities events, type of wine sold, share of natural wines, difficulties.

The research has enabled to find out that one third of the retailers is in the neighbourhood of Neukölln, the neighbourhoods of Prenzlauer Berg and Kreuzberg also have a large amount of sustainable wine retailers. Almost all the retailers have opened since 2012, besides since 2017 most of the retailers have opened in the neighbourhoods of Neukölln and Kreuzberg.

Half of the retailers employed one to five people and all of them are opening during the evening, a significant number of retailers are only opening during this period, especially in the neighbourhood of Neukölln, only an insignificant number of respondents open for morning, lunch or afternoon. 66,6% have a restaurant activity and 50% have a bar activity, whereas only 22,2% have a wine shop.

Almost all the retailers organize some events, 66,7% of the retailers organize tastings with winemakers, 44,4% organize wine pairing dinner and 38,9% organize pop-up dinner.

Concerning the category of the wines sold, 50% of the retailers sell all kind of wines, however 77,8% sell organic wines and biodynamic wines and 94,4% sell natural wines. 25% of the respondents say only have natural wines and 72,3% have more than 50% of natural wines on their wine list. Two third of the retailers have chosen this product for its taste. To finish one third, do not face difficulties with natural wines but one other third say that the lack of consumer awareness is a difficulty.

The researcher will now discuss the chosen methodology of the first sub-question.

First, over the population of thirty Berlin retailers, eighteen had taken the survey. To be fully representative, at least twenty retailers shall have taken the survey, but the researcher did not succeed to reach all of the targeted population. However, the respondents included in the survey were clearly identified as natural wine retailers within the market.

The researcher has gathered significant results in most of the themes approached, therefore, a clear persona of the sustainable wine retailers can now be presented thanks to the data collected, which was the main objective of this-question.

For this sub-question, the researcher has encountered some difficulties. To begin with, as the researcher was not located in Berlin, the only way to conduct the survey was through indirect contact with the retailers. Therefore, it took some time to gather the data as the method was the following:

a first contact was established by phone, then, the survey was sent by e-mail, if the survey was not filled after ten days, a reminder was sent to the retailers. However, some of the retailers who agreed to take the questionnaire never replied. A face to face contact with the population targeted would have been easier and less time-consuming.

One limit of the research was about the questions focused on natural wines such as the "type of wines sold", "share of natural wines" and "reasons to choose natural wines". As there is no certification for these products, it can be confusing for respondents as definition could varies from one to another. Besides, natural wines are often certified organic or biodynamic which was another point of confusion.

The discussion of the results of the first sub-question will now be discussed.

Concerning the location and the fact that recent opening was done in the neighbourhoods of Neukölln, Prenzlauer Berg and Kreuzberg, this can be understood as these neighbourhoods are considered "trendy" and with an international population, besides, it correlates with what said Liv Fleischhacker and Holger Schwarz about the influx of food and international customers in the city looking for wider options of restaurants and wines.

Concerning the opening period, as most respondents were restaurant or wine bar, it makes sense that all of them are opening during the evening. The fact that most of the retailers organized events such as tastings with winemakers or pop-up dinner, can be seen as an opportunity for suppliers to host common events with retailers and producers, as the importance of collaboration within the supply chain has been developed by many industry experts in the fourth sub-question.

The only difficulty pointed out by retailers for natural wines was the lack of consumer awareness, which can be understandable as sustainable wines being a new phenomenon for the city of Berlin. Besides it correlates with the difficulties encountered by sustainable wine suppliers at their beginning in the fourth sub-question.

II. What is the purchasing behaviour of Berlin retailers?

The objective of this sub-question was to understand the behaviour of sustainable wine retailers when purchasing wines. The same methodology as for the first sub-question was used, that is to say the survey conducted with Berlin sustainable wine retailers. Question 10 and questions 12 to 15 from the survey were used and focused on the following aspects purchasing aspects: distribution channels, purchasing factors ranking, valuable aspect from suppliers.

The research has enabled to find out that none of the retailers purchase wine from a single retailer. Besides, 77,8% of them used multiple wholesalers and 50% purchase directly from wineries

Concerning the purchasing factors of sustainable wine retailers, taste is the most important, followed by the knowledge about the winemakers and its method of production and the price. Recommendations from suppliers seems to be important for some retailers whereas the region of origin was considered the least important factor.

Concerning the most valuable aspect of from suppliers, 50% of the retailers have chosen tailored recommendations from the supplier whereas 27,8% prefer transparency and detailed wine technical information.

The chosen methodology of the second sub-question will now be discussed.

For this sub-question, the data gathered has highlighted significant results and common ideas such as the purchasing factors and distribution channels used by retailers.

Concerning the limits of the survey, processing the survey was time-consuming and face-to-face meetings would have been easier. Another limit of the survey was found on the purchasing factors question, retailers were asked to rank factors from one to five, one being the most important and five the least important. However, some respondents did not rank factors from one to five but judged individually.

The results of the second sub-question will now be discussed.

Concerning the distribution channels, results showed that most retailers purchase through multiple wholesalers. Several factors can be pointed out to explain this result, first, retailers are using competition between suppliers to ensure better prices, secondly, it is a way to have a diversity of products and thirdly, as there is no close wine producing region, it is harder to purchase only from wineries, thirdly. However, 50% of the retailers also buy directly with wineries, purchasing directly with wineries allow them to have better price, exclusivity and direct contact with producers.

It seems that sustainable wine retailers in Berlin are committed customers, as the taste factor was the first purchasing factor for most retailers and prices only comes at third. The population targeted were also mostly sourcing premium sustainable wines, so it makes sense that they care about the taste and quality of the wines. As seen in the results of the fourth sub-question, sustainable wine suppliers suggested that taste and quality are highly important matter in term of wines which correlate to this result.

Retailers also value the knowledge about winemakers as their second purchasing factor, indeed, the growing consumers' awareness makes this knowledge an important selling tool, which was also quoted in the fourth sub-question.

As Berlin has not a long tradition of wine drinking and Germany being a large importer of sustainable wine, it is logical that the region of origin is not the most important for retailers. Indeed, within the results of the third sub-question, the researcher has found out a large diversity of countries.

To finish with, even thought retailers have not judged the recommendations from suppliers one the most important purchasing factor, it seems to be important for some of them. Besides, 50% of the retailers have judged "Relationship and tailored recommendations" the most valuable aspect of a supplier; which highlights the needs for collaboration and product differentiation.

III. What is the current offer of sustainable wines in Berlin?

The objective of this sub-question is to have an idea of the current products available on the market and highlight product tendencies on Berlin sustainable wine market Berlin sustainable wine retailers.

To answer this sub-question, the researcher has analysed six wine lists from different on-trade sustainable wine retailers. Wines observed were coming from on-trade lists and prices are by the bottles. 376 wine references have been analysed for the research, under three criteria: wine category, region of origin, price.

The research has enabled to find out the following results:

The average price sustainable wines sold on-trade is 40,32€ with a median price of 35€, the largest wine range is 30€-40€ and 80% of the wines are priced between 20€ and 50€. Wine priced between 70€ and 140€ for only 6,6% of the total. Whites wines have the highest average price whereas rosés wines have the lowest.

Concerning wine categories, red wines and white wines accounts for 71% of wines, but sparkling and orange wines have a significant share as well.

A great number of countries has been observed, however almost all the wines come from Europe. The five most represented countries are France (43,6%), Spain (21%), Italy (12,5%), Germany (9,3%), and Austria (5,6%). In all type of wines category, France and Spain belongs to the three most represented countries.

Among those wines, the biggest wine range is 30€-40€, accounting for 35,1% of the wines observed, the second one is 20€-30€ accounting for 24,6**%,** and the third one is 40€-50€ accounting for 20,3%, these three wine range accounts for 80% of the wines observed. Lastly, the wine priced between 70€ and 140€ for only 6,6% of the total.

The chosen methodology of the third sub-question will now be discussed.

The large amount of data gathered allows a good representativity of what is available on the sustainable wine Berlin market. Besides significant results have come out of the research, such as the price range, the repartition of the wine categories and region of origin.

Even though traditional wine category includes, red, white, rosé and sparkling the researcher has chosen to separate orange wines *(cf. white wines of maceration*) from white wines to analyse the importance of this type of wine. It was a relevant choice to separate the two category as orange wines happens to have a share of 9,6% among the total of the sustainable wine observed, thus, it is the fourth wine category before rosés wines.

Although, it has a lot of wines' reference, the research was only focused on six different wine lists. The reason for this, is the long process of the results. To increase the representativity, a larger amount of wine lists could have been studied.

As we can see in the results about pricing, this research focused on premium on-trade wine lists. The data were gathered from restaurants who are committed retailers concerning sustainable wines and still represent a niche of the market which can be a limit of the methodology. An extend of this research could be more focused on medium-range retailers which could be more focused on price than quality. However, this methodology was made on purpose as sustainable wine is still a premium product and it was ideal to highlight common features.

Another limit could be mentioned on the results about the region of origin as one retailer were focus on French wines and another one on Spanish wines, so these two countries could have been slightly overrated. However, they were also sourcing wines from different countries and results seems to be relevant.

The results of the third sub-question will now be discussed.

The largest share of the wines is between 20 and 50 euros, even if the highest priced wine reach 140€, wines above 70€ accounts for only an insignificant volume, therefore, large volume of the wines imported should be in this price range considering the margin of retailers.

Concerning the region of origin, the available wines offer a great diversity. Even if traditional winemaking countries such as France, Spain and Italy represent a large share, countries of Central and Eastern Europe, such as Germany, Austria, Georgia or Czech Republic also accounts for a significant share. It seems that the closeness between the producing region and the marketplace matters for retailers. The research needs to be considered that wines from less famous region are also presents such as Serbia or Slovakia, therefore, suppliers need to take into consideration this diversity.

Red wines and whites' wines have the largest share, but orange and sparkling also accounts for 20% together.

On one hand, sparkling wines are well appreciated in Germany and sustainable winemakers have developed new ways of making sparkling wines without external yeasts called *"Pétillant naturel" (cf. Naturally sparkling) w*hich can be an explanation for this result.

On the other hand, orange is the result of the maceration white grapes juices with the skins giving the wine an intense colour and aromas, it is a process born in Georgia, deeply linked with natural winemaking. In conservative winemaking countries such as France, it is not well known, and the production hardly exists, however, the shorter history of Berlin with wine drinking seems to be the explanation for the significant share of orange wines, these kinds of wines settle on innovative winemaking process that can appeal new customers.

IV. What are the appropriate marketing tools to target sustainable wines retailers?

The objectives of this sub-question is to study concrete marketing tools for sustainable wine distribution in order to help suppliers to grow their business activities and target sustainable wine retailers. by using existing case studies and industry experts' recommendations

To answer this sub-question, the researcher has conducted six interviews sustainable wine distribution expert. The interviews focus on the following subjects: difficulties encountered with B2B retailers, opportunities for sustainable wine suppliers, actions and strategy to increase customers' awareness and ensure long-term relationship.

The research has enabled to find out many common themes mentioned by the interviewees related to three categories: the difficulties, the external factors of growth and the marketing recommendations

Firstly, difficulties encountered by distributors when supplying retailers are the followings: lack of product awareness, the challenge of being a pioneer sustainable wine distributor and the wine sensibility.

Secondly, concerning the external factors of growth, the interviewees have mentioned the growing wine awareness from the market, growing offer and demand for sustainable products and the support of the restaurant industry.

Thirdly, distributors have three main themes in common concerning the recommendations: the collaboration within the supply chain, the product marketing and the product sourcing.

Collaboration needs to be implemented at three levels: within the marketplace, with producers and with the retailers. Then, the product marketing was divided into three sub-themes: taste as the most important selling tool, the use of storytelling and the less important part of the organic and natural aspect. To finish with, product sourcing needs to focus on quality-driven products and producers' knowledge.

The chosen methodology of the fourth sub-question will now be discussed.

Firstly, the interviewees were chosen for they experience with sustainable wine distribution towards B2B customers. The choice of the interviewees was relevant as a large part of them have a long experience of the market and participate in the growth of the sustainable wine consumption in their respecting market, such as Doug Wregg, Marketing Director and Wine Buyer of Les Caves de Pyrenes which was the first UK company to distribute organic and natural wines in 1998, Holger Schwarz, the owner and Wine Buyer at Viniculture, who is Berlin biggest supplier for these wines and have made the choice to focus on organic and natural wines in 2006 and Christian Troy who have worked in the wine wholesale since 2001 and is now the Managing Partner of Indie Wineries, an organic wine importer and distributor in eighteen states of the U.S.A. The researcher also has interviewed Berlin writer and journalist, Liv Fleischhacker, who is specialise in food and beverage and brings another insight of the subject. Besides, the researcher aims for experts who worked in market having similarities with Berlin: a similar environment, that is to say urban areas that are non-producing regions where wine must be imported, thus, apart from Berlin experts from New York, London and Amsterdam were chosen. All these experts' views were crucial to bring concrete marketing tools to Berlin suppliers.

Concerning the interviews, semi-structure methods were chosen. This consists in open questions adapted to each participants' situation, the idea was to let the participant develop their own opinion to explore the widest range of subject possible. This chosen methodology was relevant as many themes have merged from the results and participants were at ease to develop their own insights on different subjects.

To process the interviews, the researcher has followed an inductive coding to highlight the most mentioned themes and ideas within the transcription of the interviews. This type of coding allowed the researcher to find the main axes concerning the themes. Then, specific themes, mentioned by the interviewees, have been found in common thanks to line-by-line coding and categorization. To finish with, the researcher has ranked the most quoted themes to have an objective view on the results.

The chosen methodology also has some limits and negative aspects which will be developed in the following section.

Firstly, as some participants could not take the interview by phone, some replied by e-mail, which was easier to transcript but led to less detailed interviews. However, interviews done by phone benefited from a better adaptation to the participant, but the communication could be harder, and the data was longer to transcript.

The researcher has chosen to ask six questions which led to a large amount of data in some cases. Some data were not relevant to the research and the structure could have been narrower to point out specific aspect of sustainable wine distribution. The last question about "*future trends and opportunities"* has led to unclear.

The last limit was the lack of Berlin experts willing to take the interview. Indeed, non-Berliners participants were very at ease to speak, explain their experience and give recommendations whereas, it seems that asking Berlin suppliers their views on the subject was more ambiguous as they did not want to share information for marketing purposes.

The results of the fourth sub-question will now be discussed.

First, the results related to the difficulties will be discussed, which themes are lack of market awareness, the presence as pioneer distributors and the wine sensibility.

The two first themes are deeply linked to each other and that is why the researcher has chosen participants who has a long experience because they experienced the beginning of their respecting market, such as sustainable wine suppliers are experiencing the Berlin market.

The lack of product awareness from the market was the most mentioned and can be heard at multiples level. The lack of awareness comes from consumers and from retailers which most of them are used to conventional wines. This result can be correlated with the results of the first sub-question, indeed, when asking retailers about their difficulties, the first one was the lack of awareness from consumers. Besides, it also related to the market itself, as some participants mentioned the conflict between traditional wine market and sustainable wine market, highlighting a sort of conservatism from the traditional wine drinkers and the press. Liv suggested the idea to get these wines in more classic B2C venue and also mention to target different consumers: less young and international as well as reaching the general public at entry level with accessible tastings for instance. To finish with the difficulties, the early stage of the market is an insecure aspect for retailers because they do not know the quality of the wines, the risks and opportunities. For suppliers, it is also a problem as the demand and volume importer are low, thus the opportunities are uncertain.

Secondly, the results concerning to the external factors of growth will be discussed.

The three themes approached were also linked to each other but two were the most quoted by interviewees and confirmed the literature review: the growing wine awareness and the growing market for sustainable products.

The growing wine awareness was mentioned by all participants and highlights the growth of the knowledge and commitment of retailers and consumers. This phenomenon as for consequences the need for more product knowledge from both suppliers and retailers and the need for product education which will be further developed in the third part.

The growing market for sustainable products is an opportunity for the suppliers as consumers and retailers are more aware of environmental issues, thus, the actual demand should be growing. The second aspect is the growth of available and qualitative products to fit the market which should help suppliers to develop their activities.

Lastly, the support of the HoReCa industry was mentioned by half of the participants. Participants believed it has helped to shed the lights on sustainable wines and has contributed to the growing market awareness and it became a fact that they could be qualitative wines if they are listed in fine-dining restaurants. This last theme led the results discussion to another themes approached which is the collaboration within the supply chain.

The third category of results to be discussed is related to concrete recommendations to sustainable wine suppliers.

All participants have mentioned recommendations related to the need of collaborating with other stakeholders.

Firstly, collaboration within the marketplace is mentioned by four participants.

Collaboration can take different forms; a participant mentioned the happening of a wine fair with other wine merchants as the main factor of their success as they have gathered 150 growers together. However, it shed lights on the fact that a wine fair is more a kind of communication tool than a way to make profits. Therefore, it needs to start small, intimate and to be innovative in order to increase the sense of community all over the supply chain: with producers, restaurant trade, consumers and the medias. It is also a good way to increase the product awareness as retailers can taste the wines.

Another aspect of collaboration mentioned, is the partnership with a B2C venue and tastings which needs to be done is a good atmosphere to make wine accessible to all kind of audiences. These results correlated with the first sub-question as most events done by Berlin retailers are tastings with winemakers and pop-up and wine-pairing dinner.

The collaboration with producers and retailers is also an interesting aspect as it ensures long-term relationship. For producers, it is away to have more insight from the market and offer tailored products, and for retailers, it increases product and producer's commitment. For instance, a partner product with growers, visit to the vineyard with retailers and tailored recommendations have been mentioned by participants.

Concerning the product marketing, participants have mentioned different themes: the organic aspect, the taste and the story telling.

The organic aspect was mentioned by five participants. For them, it is important not to focus on this part of the product marketing as the most important in the wine industry is the taste and quality.

When it comes to taste, participants agreed on the fact that tasting is the first selling tool of a supplier as it increased product knowledge and awareness of the retailers. Furthermore, storytelling was mentioned by four participants to engage people with and increase the product commitment. These two aspects are linked to other themes which will be discussed in the following section, the product sourcing.

Product sourcing seems to be crucial for sustainable wine suppliers, two aspects were approached: the producer's knowledge and the quality-driven products.

The need for quality-driven products was mentioned by all participants. For them, a supplier cannot succeed in the sustainable wine industry if he is not supplying qualitative products. It is important to build a wine brand around quality-driven product as the company will be identified in a better way.

As the taste is the main purchasing factor of Berlin retailers, having qualitative products is a crucial selling tool for suppliers.

Concerning the producer's knowledge, for the participants, it benefits the supplier in different aspects. Firstly, it allows a better relationship with the growers as it is needed to go in the wine producing regions to increase the supplier knowledge. Secondly, it allows a better understanding of the products, how it was made and in what conditions and environment. Thirdly, it is helping the supplier to have a better storytelling of the wines he is distributing and promote it in a better way.

5. Conclusions and recommendations

Organic and natural wines are not a new phenomenon, indeed, before the influx of chemical inputs in farming and technological process within the wine industry during the 1950's, grapes were grown with minimal inputs. However, since the 1970's the industry have seen many initiatives to reduce the inputs both in the vineyard and winemaking process. Even thought, the lack of consumers' awareness was a threat for sustainable wines growers and suppliers, the late 2000's period, have seen the growth of environmental awareness and committed consumers, helped with the gastronomical industry and press who shed light on these wines, such as the world best restaurant awarded Noma who choose to source only organic food products and wines. From this point, global sustainable wine market kept growing with large wine scene in metropolis such as Paris, London, New York or Copenhagen.

Considering that Germany is the first E.U. market for organic wines, one could think that sustainable wine scene will be developed in the main cities, however, the country is known for its price sensitivity and has not a long history with of wine drinking. Yet, Berlin has a growing number of sustainable restaurants and also has an history with bars and nightlife, the sustainable wine market is developing but still a niche compared to other European cities. The growing global market and consumers' awareness could be an opportunity for importers and suppliers, but the market is small, present risks and they lack a long-term vision and marketing strategy.

Therefore, the objectives of this research project are to find solutions for suppliers to promote sustainable wines in Berlin and grow their activities.

The knowledge gap on this subject was focus on four elements:

- The sustainable wines retailer's persona, as they are the first targeted population for suppliers.
- Their purchasing behaviour concerning sustainable wines and distribution channels.
- The current offer of sustainable wine on the market and the main trends.
- The successful marketing tools to supply sustainable wines.

The methodology implemented to answer the main question was focus and quantitative and qualitative research. Quantitative research includes a survey for sustainable retailers to define their profile and their purchasing behaviour, and the analysis of on-trade wine list to have an overview of the current offer. Qualitative research include the interview of six sustainable wine distribution experts who experienced the beginning of their respecting market, this was done to highlight successful marketing tools.

The researcher will present his conclusions in the following section.

Firstly, the sustainable wine retailer's persona will be defined.

Berlin sustainable wine retailers are mostly restaurants and wine bar, most of them having less than five employees. Besides, most retailers have opened since 2012, they are located in the neighbourhoods of Neukölln, Kreuzberg and Prenzlauer Berg and open during the evening, since 2017 the market have seen an increase of business creation in these specific neighbourhoods. Retailers mainly organize three types of events: tastings with winemaker, pop-up and wine pairing dinner. Furthermore, they have chosen natural wines for its taste and most of them have more than 50% of this product on their wine list, however, half of the retailers also sell non-organic wines. When asking about their difficulties with natural wines, retailers pointed out the lack of consumers' awareness, but a significant part do not have difficulties with the product.

Secondly, the purchasing behaviour of Berlin the sustainable wine retailer's persona will be presented.

The targeted retailers purchase wines from multiples wholesalers, however, half of them also sourced wine directly with wineries. Regarding suppliers, retailers value the most a close relationship and tailored recommendations, but the transparency and wine information is also an important aspect for them. The most important factor for sustainable wine retailers in Berlin is the taste, winemakers and production knowledge as well as price is also considered as a very important purchasing factor for them. However, the region of region of origin is the least important purchasing factor.

Thirdly, the current trends and offer among Berlin sustainable wine market will be presented.

80% of the wines available on the market are in the price range 20€-50€ however, the wines observed were priced from 17€ to 140€ with an average price of 40,32€. It needs to be considered that the median price is 35€ and wines above 70€ only accounts for 6,6% of the wines. Regarding the wine's category, even thought, red and white wines constitute the largest categories of wines, sparkling and orange wines also need to be considered as important wine categories. Whites and orange have the highest average price, the lowest being rosé wines. The market offers a great diversity of European wines region with a place for less famous countries, however, the five most represented countries accounts for 92% of the wines, they are France, Spain, Italy, Germany and Austria. Among these countries, Germany and France have the highest average price and Spain the lowest.

To finish with, the successful marketing tools for sustainable wine distribution will be presented along with difficulties encountered and opportunities.

The main difficulty evoked by sustainable wine distributors is the lack of consumers awareness as retailers have less knowledge about the product itself and its quality. This difficulty is linked to the fact that operating in a new market with a niche product involves risks and uncertain opportunities for stakeholders. To finish with the more sensitive aspect of sustainable wines also needs to be considered as it can led to bottle variation, above all in non-producing wine regions when the product is imported, such as Berlin.

Main opportunities for sustainable wine suppliers are the growing product awareness and growing market for sustainable wines. This as for consequences, an increased knowledge about sustainable wines from retailers and consumers, the growing demand for B2B and B2C, and the fact that suppliers can benefit from a large choice of qualitative products. Another aspect to be considered is the support of the restaurant industry which is as opportunity for retailers as it grows the interest and knowledge of consumers, trade and the press, as well as enacting the quality of sustainable wines.

Sustainable wine distribution experts highlight three successful tools for suppliers: collaboration, product marketing and product sourcing.

The product sourcing needs to rely on two aspects: quality-driven products and producers' knowledge. Building a supplying company around qualitative product is an important selling tool and benefits the company's image. Whereas having a good producers' knowledge is crucial in a wine market with increasing aware retailers and consumers, will allow a better long-term relationship with growers and better product marketing.

Product marketing must focus on taste as it is the most important selling tool and the main purchasing factors of retailers, thus, regular tastings with quality products should ensure sales development as well as product commitment.

The second aspect is the storytelling which is linked to the producers' knowledge. Telling the story behind the bottles, concerning the producers, the region, the winemaking and other aspects will engage the retailers with the product and afterwards, retailers will be more able to sell the wines to the finale consumers. The last consideration for product marketing is that the organic and natural aspect of a wine should never be the main sales argument and suppliers also need to work with more traditional wine retailers who also source conventional wines.

Lastly the collaboration at different levels was emphasized by sustainable wine experts. Firstly, collaborations with growers needs to be ensured for a better relationship and fitting products. Secondly, being customer-focused is important and tailored recommendations are needed for each retailer. Lastly, suppliers must collaborate within the marketplace with other stakeholders, for instance getting growers to meet the retailers and the customers or organizing events involving other stakeholders: other suppliers, retailers, consumers and medias.

In conclusion, to promote sustainable wine in the Berlin market, suppliers need to collaborate with sustainable wine retailers, focusing on opening bars and restaurants on the areas Neukölln, Kreuzberg and Prenzlauer Berg. It is primordial to fit the demand and meet Berlin retailer's expectations in term of type of wines offered, prices, and diversity of origin, thanks to differentiated products and tailored recommendations. Therefore, the first step to implement for a successful marketing strategy is to focus on a solid sourcing and relationship with growers. Then, sales development have to go through the development of committed retailers and consumers thanks to storytelling, product knowledge and tastings. To finish with, the last point is the collaboration along the supply chain with all stakeholders which is primordial to grow a sense of community in the Berlin wine market, ensure long-relationship and interest from the finale consumers.

Following this research, the recommendations are:

- Sustainable wine suppliers in Berlin should source wines from diverse wine focusing on renown wine countries such as France, Spain, or Italy which are secure products for retailers, wine regions which are close from the marketplace such as German regions, Czech Republic or Austria which are known from the market and more local, a lower share of less famous region such as Eastern Europe countries to offer innovative products.
  However, sourcing must be restrictive and start with a small amount of qualitative producers to ensure product knowledge and collaboration. Besides, suppliers should go to the vineyard to create a relationship with the growers and having a better understanding of the products, even though it could be time-consuming. In any cases, suppliers should at least meet the producers in person during a wine fair and having a good knowledge about the producing region.
  Before starting to collaborate with a winery, suppliers need to be sure of the quality of its products and its winemaking in all his ranges and believe in the potential of the vineyard as they will have to defend these producers. Quality for price is important, however, the quality must prevails on to build a brand image around it. To finish with, the prices of the wines must meet the demand: as the main price range in Berlin retailers is 20€ to 50€, suppliers should aim for wines that can be sold between 5€ and 12€ to the retailers. Wines above these prices need to be sourced as well, but in smaller quantities.
- If a close relationship is established with a specific producer, suppliers should go further and ask for a partner product thought in common with an exclusive distribution. Innovative products like orange wines, "pétillant naturels" or co-ferments (for instance, grape and apple cider) are well-appreciated in the Berlin market, this could be a starting point of reflexion to offer differentiated

products to retailers. Lastly, including a close retailer to this partnership could be a way to promote and distribute the product in an easy way and will benefit to all stakeholders in term of image, long-term relationship, and product commitment.

- Suppliers should target three types of retailers in the areas of Neuköln, Prenzlauer Berg and Kreuzberg:
  The main businesses to target are the newly open wine bar and restaurants offering sustainable wines as they are the most aware and committed on the product. As they are sourcing from multiple wholesalers, suppliers should offer competitive and differentiated products to reach these retailers. They also have more wine knowledge and are looking for rare and premium products which can be an opportunity to promote high range products. These retailers organize events such as tastings, pop-up and wine pairing, thus, consumers might be committed and educated as well. Offering regular collaborating events could be a way to get the growers to meet the finale consumers which is a way to make amateurs attached to the product. For instance, a monthly tasting with different winemakers could be the solution to involve all stakeholders and grow the awareness.
  Secondly, suppliers should reach businesses with good atmosphere who defend a sustainable approach, such as medium-range restaurant, cafés, and even cultural places. These retailers will be less committed to the products but can be appealed by the sustainability of the product. It will allow the supplier to have easily accessible products and reach average consumers who have less wine knowledge. However, as these businesses are not dedicated to wines, suppliers need to offer entry level products, offer recommendations and product knowledge to the retailers. Collaborating with innovative pop-up events related to the field of the business can be interesting to build a relationship and grow wine awareness, for instance, as Berlin is known for its cultural activities, focusing on wines and music pairing or wine and art.
  Thirdly, enlarging to new retailers which are not focus on organic wines but still wine aware and offer more traditional wines. Therefore, suppliers should aim for less innovative winemaking process and focus on the taste, the quality and the producers work in the vineyard before everything. This could be a way to reach wine committed consumers who are not into organic and natural wines.
- Suppliers should follow a customer-focused strategy, analyse what are the retailer's expectations when sourcing wines and have a good following of the sales in the retailer business. Each retailer is different and expect tailored recommendations. Therefore, suppliers should monitor how the retailer manage its wine list and offer technical wine file to ensure the good sales of the wines. Besides, offering wine training to employees regarding the suppliers' products is a way to achieve many objectives: product knowledge and commitment from employees, good relationship, increased sales.
- The whole sustainable wine market of Berlin will benefit of closeness, collaboration, increased available events, products and new stakeholders as it will grow the interest of the consumers. Therefore, wine merchants, retailers, amateurs and food and beverage medias should work together to achieve this goal. Creating a yearly event in a friendly atmosphere, including all stakeholders from growers to consumers, around sustainable food and beverage products will appeal global amateurs, enhance Berlin wine community and valorise the city as a successful sutainable wine market such as other European capitals.

APPENDIX 1: Questionnaire to sustainable wine retailers

1. ***Where is your business located?***
   - Mitte
   - Schöneberg
   - Kreuzberg
   - Prenzlauer Berg
   - Neukölln
   - Wedding
   - Pankow
   - Friedrichshain
   - Tiergarten
   - Charlottenburg
2. ***When do you open?***
   - Morning
   - Lunch
   - Afternoon
   - Evening
3. ***What year was your business created?***
4. ***What is your main activity?***
   - Restaurant
   - Wine Bar
   - Wine shop
   - Tapas bar / Sharing dishes
   - Other. Please specify:
5. ***What are you other activities?***
   - I do not have any other activities
   - Wine supplier for other businesses
   - Online wine shop
   - Wine importation
   - Events
   - Wine to take away
   - Other. Please specify:
6. ***What kind of events do you organize?***
   - I do not organize events
   - Pop-up dinner
   - Tasting with winemakers
   - Wine pairing dinner
   - Wine seminar and tastings for companies
   - Free public tasting
   - Cultural events and concerts
   - Private tasting (with fee)
   - Wine fair
   - Other. Please, specify :
7. ***How many people are working in your business?***
8. ***What kind of wines do you sell?***
   - Conventional
   - Organic
   - Biodynamic
   - Natural
9. ***Why did you choose to sell natural wine?***
   One answer only
   - Quality for price value
   - Taste
   - Growing demand
   - Ethical issues
   - Other. Please, specify:
10. ***What is the share of natural wines on your list?***
    - Less than 25%
    - 25% to 50 %
    - 50% to 75%
    - More than 75%
    - 100%
11. ***How do you purchase wine?***
    - With a unique wholesaler
    - With multiple wholesalers
    - Directly with wineries
    - With a partner wine shop
12. ***What do you value the most from a supplier?***
    One answer only
    - Financial aspect (*fair price, promotion, payment*)
    - Flexibility and regular deliveries
    - Transparency and technical wine information
    - Close relationship and tailored recommendations
    - Other. Please, specify
13. ***Please, rank the following factors***
    - Taste
    - Price
    - Knowledge about the winemakers and method of production
    - Recommendations from supplier
    - Region of origin
14. ***What is your main difficulty with natural wine?***
    One answer only
    - Related to suppliers
    - Employees training
    - Preservation conditions
    - Lack of consumer awareness
    - High price
    - Other. Please, specify:

APPENDIX 2: Structure of the interview with industry experts

A) SEMI-STRUCTURED INTERVIEW WITH DISTRIBUTION EXPERTS

1. When you started to sell natural wines to B2B customers, what main difficulties did you face?
2. How did you overcome these difficulties?
3. What specific actions did you set up to improve customer awareness on natural wines?
4. What marketing strategy did you implement to ensure long-term relationship with retailers?
5. What three recommendations would you give to suppliers who wants to promote natural wine in a young market?
6. Do you think of any other change that will occur in the market? Concerning the product itself but also the way of consuming, buyer-supplier relationship…

B) SEMI STRUCTURED INTERVIEW WITH BERLIN EXPERTS

1. Berlin has now around thirty natural wine retailers which is much more than any other German cities, how the market has evolved in the last decade and what are the reasons for this growing trend?
2. From your point of view, what are the strengths and weaknesses of Berlin natural wine market?
3. How could the market expand in the future and what are the opportunities for distributors and retailers?
4. What three recommendations would you give to distributors and actors of the natural wine scene in Berlin to promote it?
5. Do you think of any other change that will occur in the market? Concerning the product itself but also the way of consuming, buyer-supplier relationship…

Appendix 4: Transcription of the interviews

Doog Wregg, Marketing Director and Wine Buyer at Les Caves de Pyrene, London – Interview done by phone on the 18th of April 2019 – *Les Caves de Pyrene is the biggest organic and natural wine importer and supplier in the UK and also the first to be created in 1988. Since 2008, the London-based company also owns several bars and restaurant (Terroirs Trafalgar Square, Terroirs East Dulwich, Brawn and Soif) and organise a wine fair with 150 winegrowers each year since 2011.*

Question 1:

At first, natural wines in the UK, they never heard about it, the thing was not even happening in Paris and we were the first to distribute it in the UK. Even then, it did not really take off before Terroirs (*cf. in 2008*) there, there was a focus, an almost explicit focus on natural wine.

As result of opening the wine bar and getting a lot of good reviews and good critics, a lot of people from the restaurant trade were very interested by finding out if these wines were any good or not. We were under sieged for a couple of years, a lot of people were talking about it and that gets a lot of strength to the natural wine industry. At that stage, no one was knowing if it was going to be a trend or if it was going to last.

The next stage was the natural wine fair in 2011 (*cf. The Real Wine Fair*) with Isabelle Legeron and other wine merchants who have started to sell natural wines in the UK, about half a dozen, we were six or seven, and that was ga big event with 120 growers and we received a lot of good press, that was the year that really changed the game.

Question 2:

I do not think there were many people on the side that what we were doing at first, and it was more the relationship with the press was not that good and it was not very popular. People thought that, by promoting wine made in this way, we were attacking wine made in every other way, which was not the case but at the time it was either you are on one side, or you are on the other side (Cf. *conventional or natural*).

Over the years, what had changed was more and more wine companies started to specialise in these wine, dozens and dozens of restaurants started listing the wines and it became a fact until you cannot really argue about it, because the wines are everywhere! There were not so many specialists, maybe twenty to thirty retailers but it is not so many that are so, whatever, it was not much of a natural wine scene, but you now find these wines in most restaurants. Even in Michelin-starred restaurants, a lot of wine are natural. The argumentation sort of stops more or less, because people could not deny that the wines are good.

Question 3:

The fair was one of the main actions we took because it confirmed to people that wine customers were more interested in just a label, like organic, because it is more than organic, so by putting the growers in front of the consumers and the trade, it was the simplest thing to do.

The main thing to understand is that most of these growers make wine in the exact same way. The definition of what is natural is a personal one, it is something that you taste, you feel something authentic, it is real, that is why we never wanted to impose a definition or a manifesto, that would be to say that one of the growers is doing right and the other one is doing wrong. The only thing to understand is that we talk to our growers a lot, we follow what they do… Some of them change as well, so we saw natural wine as a journey for many years and more and more growers will farming better in the vineyard making wines with few additives because secretly that is what every grower wants to be able to do! And also, as we grow as a company, we have more power to buy wines that we like, so we may say "We can buy thousands of bottles otf a wine that you would make in this style" and then, they start to make wines more in that style.

Another thing is when you put 150 growers together, they start to taste each other' wines and they become more confident about making interesting natural wines and thinking "Yes, it can be done" that was something interesting about the fair. About the consumers, I always believed that growers education is not about organic and every step is done by taste it happens to me that way: "I tasted the wine and it blew my mind", we all process the same way!

What is really interesting is I was giving that talk to wine educators and they said to me "We are all like 50 60 years old and we never going to change our mind!" because they were educated to believe that this is the right way of making wines and natural wine surely appeals people who are quite young, because they never really grow up with the feeling that wines like Bordeaux were the great wines, they do not know what is great but they do know what they love.

Also, young people are more interested in the environment, where the wine comes from, how it is made… all these elements, it seems to be what people cares around the world, and natural wines is about these questions. People between 25 and 40, it is what they have been growing up with, it is this sense of the environmental issues, naturalness, authenticity, it is what they care about more than if this wine comes from a famous appellation or not!

Question 4:

We never supplied the big chains, so on the last ten years, we have been supplying the independent retailers, now we have probably around a thousand independent retailers, it is more shops how they identify themselves, they are not going to be a supermarket, it is not about the price, it is about the quality.

They tend to distend themselves from these mass-retailers, so they want something in their shelves that you cannot buy elsewhere and where you are talking about these small-production wines, then it is ideal for a retailer to care, who can sell the wine, if they have people working for them, they need to know what is on the shelve and what is in the storage.

Every week, we are getting people in the retail business need to absolutely go to the vineyard and that is the way you can sell your wine that is sitting around five hundred other bottles. Our mission is to empower people to education, enthusiasm and passion so it is not just in a shelve with some bottles. If you are not telling the story about the growers, what the soils look like… All sort of those things, interesting things that engage people with, otherwise, I cannot help them to get wine from a cash and carry but I know I can sell wine by having an understanding of who is the person who have made this wine, people love that! It is the same in the restaurants, if you look at a shelve with hundreds of references and explain "I really recommend this, I had this the other day, it is delicious", the person is going to say "I know what I am going to have, you have chosen it for me!"

Question 5:

1) Find a wine bar, not only a place that sells good wines, but it needs to have good food, good atmosphere, where people wants to meet and have a good experience that makes wine fun.

There is nothing better than wine bar that have all of that, it is not only about wine but also good beer, cocktails and food.

2) Secondly, get the growers in town, do pop-ups in restaurants, get them to takeover the place. Your biggest selling tool is when people actually meet the growers, because they feel attached to the wine. I will always advice that, in any city you are, even if it is much more easier when the vineyard are close. In Germany, natural wine production hardly exists, but if you have enough wine bars and enough stuff happenings, people will end up there eventually so get them a reason to come over and work in the market.

3) Wine fair rules everywhere, it is always a good idea but, in the end, it is just another wine fair in another place, so you have to be inventive and also in the first year you need to make it really small and intimate, not everyone can gather 150 growers every time. And it is not to make a profit. Not every country has an articulate wine spokesperson for wine, it does not matter sometimes it is just the friendliness of the people in the city, for example Vienna is a great city for wine: everyone knows everybody, you can see there is a natural wine scene going on, and I think that also attracts people who came there also for the wine, it has that feeling there.

Question 6:

The thing with trends is that everything which is a trend will disappear, the root system that what matters. Natural wine is a root system because you can trace it back, as long as wine as existed it was natural, there were also industrial farming but in the long term in the world of wine, people are leaving away from chemicals in farming.

For a while, there were a trend for orange wine and skin-contact, but I think now it is part of the scene, everyone was going mad for Georgia because they have amazing winegrowers and gastronomical culture but overtime, I think in term of countries, each countries one by one will have nice initiatives.

In England there is hardly nothing but there are people who starts farming good wines, but it seems still very conservative. Austria if you look at some of the wines of some parts, they are amazing but, in a way, they are also still quite conservative in other parts. USA you have California and Oregon, but New York is first for the wine bar scene.

Places like New York and Copenhagen, things like skin-contact they get mad for it, but I like to be in London because it is not about that, if you want to succeed in this market, where you can find wines from every country in the world, many retailers and different type of restaurants, you need a palate. So, I like London because it is a very competitive market and you need to have good wines to see your wines succeed, you do not need to have huge volume but you have people who are quite sophisticated in their taste.

Other than that, I see the growth of the independent retail sector to feed the absence on the high streets, all the big chains are gone, like Majestic, they disappeared and becoming online retailers, but the actual shops are increasing. I think the sort of people that are now in wine, not the people in banking, or accountancy or the civil service, not of these people are expecting guaranties, they are not paid well, so many people wants to be in the wine trade because there is more natural wine, not for Bordeaux or primeur, because it is also about how were making wines, travelling, learning about other cultures, this is what retails people are about, even merging cultures which you did not know they existed.

Christian Troy, managing partner of Indie Wineries, New York City – Interview done by e-mail on the 10th of May 2019.

Christian Tory have worked in the wine wholesale business since 2001, selling every size of wine brand and launching major movements in wine during the past twenty years. Indie Wineries was created in 2011, it imports and distributes in California, Oregon, Washington, New York and New Yersey, as well as supplying distributors in fourteen other states.

Question 1:

Availability- many of the wines come in very small quantities, and so only a few clients can have them.

Variability- even for those clients who are very knowledgeable, natural wines that are sold in global markets see a lot of bottle variation, sometimes not in a good way (mousiness, heavy reduction, etc…).

General market knowledge…We work to tell the wine's story and not drive the point initially that a wine might fall into the natural wine camp. The reason for this is that even within the natural wine world there still a lot of debate about natural wine, what constitutes it, where are its boundaries, etc..

Question 2:

On availability, we've built a robust allocation system to honor historical supporters, but also (if inventory allows) open the door for new buyers as well.

On variability, we are asking our producers more and more for samples. We simply have to taste before committing.

On the market, per above, we talk about the wine and the producer. If the buyer asks about the wine's natural status, we will discuss this.

Question 3:

Not many. We believe in producers who farm organically. We like to see producers who work with native yeasts and low sulfur levels, but we're not dogmatic about it. We believe in great wine first and the support of the producer who's honest intention is to make great wine that has something to say thru authentic and intentional choices. If the result of all of that is that the producer is defined by the natural wine community as a natural winemaker, that's OK by us, but it's not something we strive for- it's more a result of what we strive for.

Question 4:

We listen- a lot. In B2B, our clients buy wine to sell it and make money. Hopefully, they have a strong point of view and buy amazing wines to do this. But, for example, if retailer X bought 50cs of Overnoy and after 3 years couldn't sell it…then their Overnoy stops becoming a great thing for them, and starts becoming an inventory and business problem. So, we listen a lot to each retailer to understand what their business can accomplish, and then we work with them to offer wines in our portfolio that allow them to be successful (both in their ethos and their business), and over time we look to slowly introduce new ideas that are along the ideas of our own ethos and thought.

Question 5:

Buy good wine first.

Understand the producer and the producer's wines you are working with (specifically to how those wines handle global transport).

Know the marketplace and carry a relationship with it.

Question 6:

As much as buyers are more knowledgeable than they ever have been, the market has also increased exponentially, and the choices and competition are greater than they ever have been. Relationships- on both sides (winery and market) are more key now than they ever have been. Those who do the work, the fundamentals will come out ahead.

Phillipe Essome, founder and wine buyer of Ten Bells and Fifi's Wines, New York City – Interview done by e-mail on the 23rd of April 2019

Ten Bells was created in 2008 and is a New-York-based natural wine and tapas bar. Fifi's Wines was created in 2016, it imports and supplies natural wines to other businesses in New York and distributors in other states.

Question 1:

I started the distribution in May 2016. It actually was not that complicated as most accounts I would reach out were involved with the type of wines I work with, and usually knew me because of Ten Bells.

Question 2: Not answered

Question 3:

I didn't set up any specific action beside going out with wines and make customer taste them. The wines are supposed to speak for themselves, if they are clean and tasty, some customer will like them and buy them.

Question 4:

I don't believe in marketing much in our job. It's all about the wine, not about talks, social media or marketing. If you build your brand around quality wine, your customers will follow you, retailers or on premise.

Question 5:

Go out, meet people, taste wines with them, tell them the story behind the wines because these wines have a story

Question 6:

I hate the word "trend" as much as the word "natural wine". This is not a trend, it's a conviction, a way of living. Trends, marketing & social media have shifted the debate, now we talk about "orange wine", I've seen restaurants with a "brown wine" section and I think this is just ridiculous and makes no sense. We keep talking about SO2 as it's the msot essential think in winemaking as it's not. This industry is sick as the views are about "opportunities" rather than just relay the hard work done by the wine makers...

Liv Fleischhacker, food and beverage journalist, writer and co-founder of Berlin Drinks, Berlin – Interview done by e-mail on the 25th of April 2019 – *Berlin Drinks is an online website founded in 2017 which list Berlin bars.*

Question 1:

Berlin has now around thirty natural wine retailers which is much more than any other German cities, how the market has evolved in the last decade and what are the reasons of this difference?
Berlin is younger and a lot more open to new experiences than other cities. The last decade has seen a huge influx in the food/drink world in general here in Berlin so it would only make sense that natural wine is growing as well. More money, more tourism, more international clientele asking for a wider range of options.

Question 2:

From your point of view, what are the strengths and weaknesses of Berlin natural wine market?
Like you said, there are 30 different ones which is a strong point. What I find difficult is that up until recently, they were hard to reach to the public. This has been changing, and it's a welcome change, reaching out directly to the consumer and making tastings available to the public. You don't need a brick & mortar shop, people should be working together more and restaurants could/should be open to hosting more tastings.

Educating the consumer in terms of faults and flaws is something that I think we need to see more of.

Question 3:

Opening things up to the public, more education, more face to face meetings at entry points that are feasible for the general public. Once you meet the winemakers, put a face to the label, you're much more likely to continue buying their wines. Opening this I think is something we should be doing more and more. Specifically in a city that has no close wine region.

Question 4:

1. As much as Berlin is considered a young "cool" city I think natural wine needs to drop exactly that to expand to a bigger audience. In Germany particular you have a certain type of wine drinker who only wants to drink Riesling from the Mosel and a grand Bordeaux. But there's much more and catching those old school wine drinkers is what the natural wine scene should be doing aiming for.

2. De-mystifiyng themselves, natural wine isn't a trend and importers and distributors should look at the longevity of it. Build their business plan around that instead of what's "currently trending".

3. Try and get natural wine into more classic, non hip, non new food scene restaurants. just good food served in a nice atmosphere, be that "hip" or not.

Question 5:

Good question. Hopefully grow bigger and better. More educated consumers demanding more and better products.

Holger Schwarz, owner and Wine Buyer at Viniculture, Berlin - Interview done by phone on the 25th of April 2019 - *Viniculture is a Berlin-based wine shop created in 1984 and since 2006, it is also a supplier for other businesses and the largest one for organic and natural wines in Berlin. Holger Schwarz took over the company in 2006 and changed the wines to source more organic and natural products.*

Question 1:

We were one of the first wine dealers in 2006 and these wines were nearly not known. At the beginning people did not know the wines of other colours, of other tastes, they were used to have these normal fruity wines and at the beginning they nearly brought back every single bottle thinking that it was oxidized or sick, but they were just not used to the taste, nearly no one was. Nowadays, almost everyone has tasted them (*cf. the natural wines*).

Question 2:

We just believed in the quality, difference, potential and success of these wines and we went on, we always had a portfolio of "normal wines" to manage and then, with time, people were more used to it, because they drunk it once in London, Paris or wherever, Scandinavia and then, also with these *Noma* aspect (*cf. See below)*, this gastronomical vibe as well, you were more able to succeed.

(cf. This 2 Michelin stars Copenhagen restaurant had a revolutionary impact on gastronomy by its approach of food and seasonality, it was also known for sourcing only organic and natural wines. Noma was awarded four times best restaurant in the world from 2010 to 2014 by the "Worlds 50 Best Restaurant" list.)

Question 3:

German wines are known for fruitiness and sweetness, so it is just the opposite, you need sulphur and filter strongly, that is the deep typical German wine quality. That is why, when these wines came in, the market was shocked because it was totally different, especially compared to German wines, because the style of a typical German wine was the very opposite of what a natural wine can be, very dry. Thus, it was very hard to succeed because they appreciate wines that, at this time, were totally different.

We have a lot of foreign restaurant owners, who came from even more expensive countries, when the rent are higher like England or the US. Here they have the possibility to have a rent they can pay and that is why they moved here and they also have more knowledge about natural wines, so a good part of our B2B customers are not German.

Question 4:

Actually, we are feeling comfortable in the niche, and it is getting out of the niche to a bigger market. Now, we can choose from a lot of good wines, but the problem is the production of these wines might be higher than the demand which is still at a quite small level, but the production is getting higher. Then, we will have other wine dealers and traders getting into natural wines so there is this problem of pressure to push the product into the market. To conclude, we are getting out of the niche which is nice, but we are not the only one anymore, there are a few sustainable wine suppliers now and also companies who were working in "normal wines" before are getting interested in natural wines because now they see the proof that it was a success and that the production is making good quality. In the end, it is better and worst.

Question 5:

You always must be a bit further, to us it is important to take the very small wineries and to have our own labels, which we are doing right now, especially with these small biodynamic German wineries. We do the wines together, with our experience, to have our own product, to differentiate our own personal brand so there is a clear footprint from Viniculture and it is also good for the wineries as well because they can work with our experience in the market and maybe as well, a bit how to make the wine. I think this a good way to get the higher prices we actually need for our work, because we are not working with brands, we built our own small brand, and, in the market, which is growing with good quality you have to make clear which is your territory. We are not really a producer, but we are doing the labelling, for example, we have three wines from the Pfalz region, a sparkling "pet'nat", a red wine and a white Riesling. It is not clearly mentioned that it is for Viniculture and it does not have to, but every demand is coming back to us for Germany. The only way to get it is here and that is much better without Viniculture on the label because most retailers do not want a wine made from a trade, they want to make it a discovery for the customers or sell it like that. This is a way how we tried, we as well are moving to the wines made from pears like ciders or poirés.

Question 6:

The wines are getting more and more elegant, even the one made without sulphur, there will be finer wine-styled, there is some already but we are getting more and more wines like this and this will be the excellence. There will less yeasty and wild natural wines, there is space for this as well, but consumers are looking for finer style and less rough style.

Richard Van Liden, Sales Director at Coenecoop, Netherlands – Interview done by phone on the 19th of April 2019 – *Coenocoop Wine Traders is a Dutch company created in 1991 which belongs to the Delta Wines holding company since 2007. It imports and supplies wines to the Netherlands B2B customers and exports in Belgium, Sweden and Germany. Since 2006, they specialized in organic wines and are now one of the leaders for those wines in the Dutch market.*

Question 1:

First of all, people were doubting the quality.

Second of all, they did not like to pay more for organic wines.

Question 2:

First of all, we showed them how good organic wines could be.

Secondly, we explained them what the difference is between organic and non-organic.

Third people were asking for it, so in the end, in the beginning you sell at a few places and you reach a few customers but there are some customers that do not mind if a wine if organic, they just want a good glass of wine. When they saw that more and more glasses of wines were organic, in the end, they were also asking for organic.

Question 3:

We organized a lot of tastings, we were not facing a lot of competition as we were one of the only or maybe the only one to source organic wines. Thus, you get a bigger crowd so that is one thing.

Question 4:

We are specialist in the market, so we have a lot of knowledge of what is happening in the market and our buyers' relationship grow by themselves.

Question 5:

1.They should choose organic because it is better for themselves and it is better for the customers and for the environment. When farming organic you save five kilos of pesticides per hectare, thus, if you consider wines as water, it will be forbidden in the market because there is too much pesticides in normal wines. It is coming in the river, in the soils so it is better for all of us.

2.This is a movement that can be stop, people are becoming more and more aware and wine is part of it. They also are spending more time on what they eat and drink.

Question 6:

In the Dutch market, people are drinking less wine but better quality in general. What we see is organic producers are going further than only being organic, they are doing biodynamic methods, they make orange wines, they make more natural wines, wines without added sulphites... I will be very fortunate that in five or ten years wines the wine market will be finer because during twenty years, we tried to make wine looks like a beer or coca cola but it is not and it is time to make wine, wine again.

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